



Nature + Love Project

Historic Showcase Trial Refurbishment

Invitation to Tender

November 2022

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Required Services: Historic Showcase Trial Refurbishment

Estimated value of Tender: £25,000

Estimated Duration of Contract:

- Appointment 14/12/2022
- Survey w/c 19/12/2022
- Finalise Methodology 09/01/2023 – 20/01/2023
- Refurbishment period 23/01/2023 – 03/02/2023
- Ideally completed and report issued by Mid-February 2023

Name of Contact: Kirsten Walker

Timetable for Tender Process

ITT Issue	21/11/2022
Clarifications Period Closes	28/11/2022
ITT Submission Deadline	12noon, 09/12/2022
Clarification Meeting	12/12/2022
Notification of Appointment	14/12/2022
Contract Commences	15/12/2022

1. Introduction

1.1 Summary:

The Horniman Museum and Gardens is planning a major redevelopment of parts of its Gardens and its Natural History Gallery, to be completed by early 2026. The re-invigorated and re-interpreted outdoor and indoor spaces and associated collections will enable us to celebrate our love and need for the natural world and encourage an inclusive and positive movement for environmental change amongst our audiences. The redevelopment will span three gardens and two gallery spaces. The total project budget is circa £8.9million.

As part of the Nature + Love project, the possibility of refurbishing the historic showcases in the Natural History Gallery is being explored. This is to improve their Airtightness (AER), Relative Humidity control, Security, Lighting and general suitability for artefact display. A trial refurbishment is required to understand the suitability of the proposed interventions, and to provide data on environmental improvements. The Trial Refurbishment Brief for the proposed modifications of Bay 4, Cases 48 – 53 is set out in Appendix C.

The AER test will be carried out following the completion of the refurbishment works, with monitors installed and readings taken by English Heritage and arranged by the Horniman directly.

The Horniman Museum and Gardens is inviting tenders from appropriately qualified, experienced and resourced companies that will provide the following services under one contract:

- Survey (including Asbestos Survey)
- Costed and Finalised Methodology
- Historic Showcase Trial Refurbishment Report detailing lessons learnt

We expect the successful tender to work closely with the Horniman Estates Team, Architectural Design Team, Exhibition Design Team and Project Manager in order to deliver the trial refurbishment.

1.2 Horniman Museum:

In 1901 Frederick Horniman gave the Horniman Museum and Gardens as a free gift to the people for their education, recreation and enjoyment, and this vision still remains central to the Horniman today. A blend of high-quality collections spanning the natural, multi-cultural and musical worlds; 16 acres of well managed urban open space; community based educational and leisure programmes and a wide range of performance, events and activities provide an unrivalled opportunity to encounter and understand the richness and variety of the world in which we live.

The Horniman's audience is local, national and international and it actively seeks to attract users of all ages, backgrounds and abilities. It is a much-loved community resource for London and the South East. It has an exceptional record of educational achievement and works with a range of partners to develop its learning programme and encourage participation from as wide a range of people as possible.

1.3 Current Issues for:

1.3.1 *The Natural History Gallery*

Our Natural History Gallery first opened in 1901 and has changed very little over the past century. Indeed, the bulk of the interpretation has been in-situ since the 1960s. The Gallery features several different natural science-based topics and themes, mainly evolution and adaptation. The approach to interpretation is out of date and much of the labelling is scientifically inaccurate. The poor presentation of scientific content, its relevance and comprehension are a significant barrier for families, schools and marginalised groups. It makes few connections between people and nature and does not explain the impact and implications of climate change or biodiversity loss and what this means for the future of life on the planet and what we might do to help.

This Gallery still retains many of the original showcases built in 1901 and these contribute to an historic atmosphere much loved by our visitors; however, the cases are not airtight, let in dust and insect pests, have minimal lighting and need refurbishment to improve their condition. Most of the cases retain their original Edwardian locks and are either very difficult or very easy to open.

The general infrastructure of the Gallery needs urgent attention, the fabric of the roof is failing, there are damp walls, worn out floors, pest infestation issues and the lighting and gallery environment are difficult to control with temperature and humidity fluctuating widely between the summer and winter months. The redevelopment of its companion gallery, the World Gallery in 2018, has only served to highlight its outdated and tired infrastructure and content. All of these issues affect the visitor experience and need to be addressed as part of the Nature + Love project.

1.3.2 *Our Natural History collection*

In 2012-13 we conducted an in-depth review of our Natural History collection, supported by the Esmée Fairbairn Collections Fund. This enabled us to re-evaluate the strengths and potential of the collection for increased public engagement, display, and in learning and research terms. The Natural History collection contains around 250,000 specimens. Currently only a small proportion are on public display, the vast majority for many decades without rotation. Recent research shows that our visitors would like to see a greater diversity of specimens on display that showcase the quality and significance of our collection. A major re-design and re-display of the gallery introducing new themes and topics will allow us to showcase more of the spectacular and significant specimens currently housed in our Study Collections Centre, many of which have not been displayed for many decades.

In addition to this, new acquisitions and loans (large taxidermy specimens or dinosaur models) will be procured as spectacular gateway specimens to provide a more accessible route into a particular topic or theme.

2.0 Nature + Love Project

2.1 Natural History Gallery Historic Showcase improvements we want to achieve:

Our new Natural History Gallery will retain its historical infrastructure and atmosphere, as well as many of our most popular specimens like the walrus. Using our existing collections, new acquisitions and loans, our displays and interpretation will be brought up to date – including human impact on the environment for the first time, making it more relevant and accessible to a wider range of people, and in particular ‘Devoted Domestics’ with a focus on families with children aged 4-10. The Gallery will explore and celebrate our love and need for the natural world and also show how people have related to, understood, exploited and changed the natural world around the globe through time. It will examine our impact on the planet, the lessons we might learn, and how new scientific approaches, advances, fresh thinking and understanding can guide us towards a more sustainable, healthy and balanced future.

The oldest cases are built from mahogany, but it is not yet known which the oldest cases are. There is not a great deal of detail about how the cases are built, fixed to the wall, or held up, because there is very limited record / evidence at this stage except for the physical changes that can be seen. Therefore, it is not known exactly how much they can be improved/altered/moved to minimise the impact on any original fabric of significance. At this stage in the project, the requirement for a trial has been identified to determine how effective the planned refurbishments could be, and what exactly would be involved, in order for the impact to be assessed for the whole gallery. The intention is that one case undergoes the planned modifications, which would be permanent. The Air Exchange Rate (AER) in the cases will be tested before and after the works to determine the degree of improvement.

The cases that have been identified for this trial sit within Bay 4, to the North-West, ground floor corner of the gallery. They represent the typical 'case type' that is being considered for refurbishment, being hinged glazed doors to fitted carcasses. The following pages describe the existing condition of the cases, as well as the intended modifications:

- NHG 83 001 - Bay 4, as Existing (drawings)
- NHG 83 002 - Bay 4, as Existing (photos)
- NHG 10 002 - Bay 4, Dismantling
- NHG 83 005 - Proposed Modifications to cases 48-53

*Note, English Heritage undertook a test on some of the cases in the gallery in 2019, including cases 45-47 (just adjacent to the ones we are proposing for the trial), which provides good detail about where the leaks are and how best to mitigate these. This report is attached for reference.

The cases in the gallery are covered by the Grade II* listed status of the building. The intention is that the findings of these refurbishment works will feed into future briefing for wider showcase refurbishment.

A secondary part of this trial is the opportunity to visually inspect the condition of the West Wall of the galleries, whilst the interior of the cases is being taken apart. RH readings indicate that this area is more humid, possibly the result of hygroscopicity in the external wall on the west elevation, however because the cases are fitted in front of the wall it has been impossible to determine the extent of this issue. Whilst the case refurbishment trial is being undertaken and panels / parts are removed for replacement, there is the opportunity to see in directly to this wall surface. Coordination with the Architectural Design Team will be required to ensure that the appropriate people are available at the right time in the works to see into the wall.

We are not aware of the presence of Asbestos in the historic showcases and an asbestos survey has not been carried out, neither is an asbestos management report available for this particular area. An asbestos survey will be required prior to dismantling.

2.2 Practical Considerations for the Nature + Love redevelopment:

2.2.1 *Project look and feel:*

As mentioned above we wish to retain the historic nature and atmosphere of the existing Natural History Gallery if at all possible. Many of the existing cases were constructed as part of the original Charles Harrison Townsend 1901 building development and are considered to be part of the Grade 2* listing. We know that our visitors love the historic look and feel of the existing space and the opportunity it provides for all our visitors to get up as close as possible to the specimens without actually touching them.

It is, however, essential that the gallery spaces, displays and interpretation are brought up-to date and we would expect the end result to be friendly, accessible and unthreatening, with relaxed seating, appropriate interactives, digital interventions and an interactive action zone. We wish to create an environment that inspires our visitors to explore and celebrate our love and need for the natural world, instilling a sense of curiosity and wonder and challenging visitors to take positive action to help preserve the world we all share.

2.2.2 *Showcases:*

We are keen to explore the potential to retain many of the existing showcases by refurbishing them to improve their air-tightness, incorporate local environmental control into the bases of these cases, improve security and safety aspects of the cases and install better and more efficient display lighting. This trial refurbishment study will be carried out as soon as possible in early 2023 to test the feasibility and costs of this approach and we expect the Contractor to work closely with the Horniman Estates Team, Architectural Design Team, Exhibition Design Team and Project Manager during the trial refurbishment works.

2.2.3 *Lighting:*

Provide new, modern lighting to the showcases which gives flexibility (adjustable focus / positioning). Lighting to be LED (light emitting diode) with drivers located in accessible, well ventilated but discreet locations. Allowance for lighting control should be factored in for additional functionality and flexibility.

2.3 Environmental issues / Sustainability:

In 2019 the Horniman declared a Climate and Ecological Emergency and published its Climate and Ecology Manifesto in early 2020, with the aim of becoming greenhouse gas neutral by 2040. It is essential therefore that we take a low impact approach to the design and specification of all elements of this project, wherever possible reducing its environmental impact and ensuring that all materials specified are either recycled and reused (including reusing our original cases where possible) or obtained from environmentally sound and sustainable sources. We expect the Contractor to work closely with the Exhibition Design Team to ensure the materials, processes and finishes specified are of the highest environment standards.

2.4 Accessibility:

The Horniman is firmly committed to ensuring that all its projects are designed with full consideration given to the physical and intellectual needs of all its visitors, including children, people who are disabled, learning disabled, Deaf or hard of hearing.

We have a long-standing external Access Advisory Group who meet at least four times a year and who will work closely with us on the Nature + Love project. All design teams will work closely with this group throughout design development, allowing sufficient time for them to review and comment on plans at key stages.

2.5 Health and Safety:

The design and specifications of the Historic Showcases Trial Refurbishment must comply with the relevant statutory regulations regarding health and safety, fire safety and emergency escape requirements and to this end, before final working drawings are produced, the Contractor must supply plans and details of materials to be used for approval by the Client, local authority Fire Officers and any other relevant statutory body. All requirements of the CDM Regulations 1994 and the Health and Safety at Work Act 1974 must be complied with.

2.6 Longevity and Maintenance:

The intention of the Horniman is to create an environment which is robust, hard wearing and as low maintenance as possible to cope with the demands of extreme usage by a large number of visitors of all ages. We would expect the lifetime of the trial refurbished showcases to be at least 20 years with an update after 10 years.

2.7 The Development Process:

The development of the Nature + Love project is dependent on securing a significant grant from the National Lottery Heritage Fund. We received a Stage 1 pass in December 2021 and have just started the development phase of the project. The development phase will consist of working up the designs to the equivalent of RIBA Work Stage 3 and submitting a Stage 2 funding application to the NLHF in February 2023.

If a Stage 2 pass is achieved and planning permission is granted, the scheme will then be worked through to final design and realisation.

The Historic Showcase Trial Refurbishment will provide necessary information about the success and benefits of the refurbishment in terms of environmental control, accessibility and costs of potential future wider refurbishment works to the historic showcases.

2.8 Constraints:

In November 2022, the Project received permission to undertake the trial refurbishment of Bay 4, Cases 48 – 53 from Lewisham Councils Senior Conservation and Urban Design Officer.

The cases in the gallery are covered by the building Grade 2* listed status.

The Natural History Gallery is open to the public, therefore the Contractor should allow for site set up and noisy works to take place outside of public opening hours.

Please refer to the Horniman's rules for visiting contractors and site logistics information set out in Appendix D.

The Contractor will be required to provide hoarding and protection to the floor and surrounding cases, with proposals to be agreed by the Horniman in advance of works being carried out.

2.9 Pricing Schedule:

Please refer to Appendix D.

3.0 Contractor Brief

3.1 Introduction:

The Contractor shall provide the Services described with an excellence of service as expected of a competent, professional person of the relevant discipline in the performance of their services who is experienced in carrying out such services in relation to works of similar size, scope and nature to the proposed works.

The Contractor will be required to provide all services identified within the Schedule of Professional Services included at Appendix A.

The Horniman Museum and Gardens reserves the right to use or publish any part of the documents in association with the development of the scheme.

Any reports, design work and proposals will become the property of the Horniman Museum and Gardens.

3.2 Basis of Appointment:

The Contractor is requested to propose terms and conditions/contract within their tender response. The employer will be the Horniman Museum and Gardens.

3.3 Insurance:

The Contractor will be required to maintain the following insurances:

- Employer's (Compulsory) Liability Insurance = £5,000,000
- Public Liability Insurance = £5,000,000
- Professional Indemnity Insurance = £1,000,000

3.4 Turnover:

The supplier's turnover should be no less than 2 x the annual value of the contract.

4.0 Instructions to Suppliers

4.1 Summary of Information to be included within the Tender Submission:

1. Form of Tender (Appendix B) which includes:
 - Fee Offer
 - Fee Breakdown
 - Resources
 - Rates
 - Offer Period
 - Official Signature.
 - Signed Anti-Fraud and Bribery Statements
2. Relevant experience of individuals in proposed team (CVs)
3. Methodology demonstrating approach to Historic Showcase Trial refurbishment of Bay 4, cases 48 – 53, including assumptions for improving their Airtightness (AER), Relative Humidity control, Security, Lighting and general suitability for artefact display.
4. Three relevant examples of previous experience in heritage working with listed buildings delivering showcase refurbishment.
5. Identify challenges experienced previously and the approach taken with clients and design teams to deliver to budget on similar projects.
6. Proposed Terms and Conditions/Contract

4.2 Submissions:

Tenders must be submitted **by no later than 12noon, 9th December 2022**. The tender is to be submitted via email to Fiona Smallcorn, Administrator, Focus Consultants on administration@focus-consultants.com

During the tender period, should the tenderer wish to present questions or seek clarification on any information contained within this pack, requests will only be considered up to 28th November 2022 via email to Fiona Smallcorn, Administrator, Focus Consultants on administration@focus-consultants.com

4.3 Procurement Programme:

The programme for the procurement process is as follows:

ITT Issue	21/11/2022
Clarifications Period Closes	28/11/2022
ITT Submission Deadline	12noon, 09/12/2022
Clarification Meeting	12/12/2022
Notification of Appointment	14/12/2022
Contract Commences	15/12/2022

4.4 Judging Panel and Evaluation Criteria:

The judging panel will be made up of key members of the Horniman Museum and Gardens, Design Team and Focus Consultants.

4.4.1 Tender Assessment

The tender assessment criteria for all tenders will be based on qualitative and quantitative criteria as follows with associated weighting:

Quantitative	Price	30%
	Resource	5%
	Signed Anti-Fraud and Bribery Statements (Pass/Fail)	
Qualitative	Relevant experience of individuals in proposed team (CVs)	5%
	Methodology demonstrating approach to Historic Showcase Trial refurbishment of Bay 4, cases 48 – 53, including assumptions for improving their Airtightness (AER), Relative Humidity control, Security, Lighting and general suitability for artefact display.	20%
	Three relevant examples of previous experience in heritage working with listed buildings delivering showcase refurbishment.	20%
	Identify challenges experienced previously and the approach taken with clients and design teams to deliver to budget on similar projects.	20%

A desktop assessment will be carried out of all tenders received against the criteria outlined below. Where questions are to be scored and weighted, each question and sub-question will be scored in accordance with the scoring matrix below. The score will then be awarded and the percentage weighting applied to give the weighted score for that question as shown overleaf:

Capability	Response	Remark	Marks
Supplier is likely to be able to meet the needs of the Authority.	Response exceeds the anticipated answer and is completely convincing and relevant to the Project with substantiation from independent sources and references.	Absolute Confidence	10
Supplier is likely to be able to meet the needs of the Authority.	Response comprehensively answers the question and is convincing and relevant to the Project.	Confidence	8
Small risk that Supplier will not be able to meet the needs of the Authority.	Response sufficiently answers the question without omission and is generally convincing and relevant to the Project.	Minor Concerns	6
Moderate risk that the Supplier will not be able to meet the needs of the Authority.	Response has minor omissions and is in part(s) unconvincing or irrelevant to the Project.	Moderate Concerns	4
Significant risk that the Supplier will not be able to meet the needs of the Authority.	Response has major omissions and is largely unconvincing or irrelevant to the Project.	Major Concerns	2
Supplier will not be able to meet the needs of the Authority.	No response or misleading response provided.	Not Acceptable	0

The price related elements of the qualitative criteria will be scored in accordance with the following;

The lowest price or percentage will be awarded maximum mark of 10. All other tenders will then be assessed against the lowest with marks being deducted by the percentage that their submission is higher as per the worked examples below. Note that the minimum score that will be awarded is 0.

Example 1	Tender Price	Percentage Difference from the Lowest (x%)	Calculation of Score 10 – (10*x%)	Score Awarded
Tenderer A	£10,000	0%	10 – (10*0%)	10
Tenderer B	£12,000	20%	10 – (10*20%)	8
Tenderer C	£17,000	70%	10 – (10*70%)	3
Tenderer D	£25,000	150%	10 – (10*150%)	0

Example 2	Tender Percentage	Percentage Difference from the Lowest (x%)	Calculation of Score 10 – (10*x)	Score Awarded
Tenderer A	20%	0%	10 – (10*0%)	10
Tenderer B	25%	25%	10 – (10*25%)	7.5
Tenderer C	30%	50%	10 – (10*50%)	5
Tenderer D	45%	125%	10 – (10*125%)	0

The resource related elements of the qualitative criteria will be scored in the same way but to the inverse with the highest resource awarded maximum mark of 10. All other tenders will then be assessed against the highest with marks being deducted by the percentage that their submission is lower as per the worked example below. Note that the minimum score that will be awarded is 0.

Example 3	Tender Resource Days	Percentage Difference from the Highest (x%)	Calculation of Score 10 – (10*x%)	Score Awarded
Tenderer A	200	0%	10 – (10*0%)	10
Tenderer B	180	10%	10 – (10*10%)	9
Tenderer C	140	30%	10 – (10*30%)	7
Tenderer D	30	85%	10 – (10*85%)	1.5

In addition to the desktop assessment, tenderers may be invited to attend a clarification meeting on 12th December 2022.

4.5 Site Visits and Queries:

The museum and gardens are a public site, prospective contractors are free to visit within opening hours in advance of submitting a tender.

Opening hours can be found on the Horniman Museum and Gardens Website: www.horniman.ac.uk

Any queries should be issued by email to Fiona Smallcorn, Administrator, Focus Consultants on administration@focus-consultants.com

4.5 Contract Award:

Suppliers and those organisations looking to bid for public sector contracts should be aware that if they are awarded a new contract with a publicly funded body, the resulting contract will be published. In some circumstances, limited redactions will be made to some contracts before they are published in order to comply with existing law and for the protection of national security.

Appendices

A – Schedule of Professional Services

B – Form of Tender

C - Historic Showcase Trial Brief

D – Pricing Schedule

E – Rules for Visiting Contractors and Site Logistics

F – Pre-construction Information

G – Standard Selection Questionnaire

Appendix A

Schedule of Services

This Schedule of Service is for the provision of the Historic Showcase Trial Refurbishment.

The following refers to the RIBA Plan of Work 2020.

The Consultant shall provide the Schedule of Service described with an excellence of service as expected of a competent, professional person of the relevant discipline in the performance of their services who is experienced in carrying out such services in relation to works of similar size, scope and nature to the proposed works.

The Consultant will be required to provide the following services:

Conservation

The refurbished cases should look very similar to the existing cases. Improvements should be justifiable and as discreet as possible. Any exposed timber at the end of the works will require finishing / refinishing to be visually identical to the existing. Repairs to existing sign-written case numbers may be required.

Environmental Control

The following environmental control targets are to be achieved:

- Target Relative Humidity - 50% +/- 5% / 24 hrs
- Target Air Exchange Rate 0.1 / 24 hrs
- Sealed case environment to control dust and pest ingress, as is currently experienced at the museum.

Notes from English Heritage Report (24th Sept 2019): The ability of the case to condition to 50% RH +/- 5% RH will depend on the room RH seasonal variation, the AER of the case and the volume of Prosorb.

The room RH seasonal variation and AER will affect how often the Prosorb requires reconditioning. Whilst refurbishment of some historic cases has achieved 0.1 AER, based on previous experience a higher AER is more likely.

An AER of 0.4 would still be acceptable to provide passive control using Prosorb. For higher AERs the Prosorb may need reconditioning more regularly.

Display cases are not able to passively control temperature conditions. To control to 19°C +/- 2°C is likely to require some form of room environmental control (note, temperature control is not part of the Aims of Refurbishment)

Security

Provide an upgrade to the cases to improve security where possible. It is assumed that the cases already have security film fitted to the glass.

Note that achieving Government Indemnity Scheme (GIS) Security standard for the refurbished cases is unlikely to be possible.

- Using 11.5mm anti bandit glass will make the glazed panels much heavier than they are currently and will require additional structure to support this additional weight. The lift-off panels will also be much more difficult to lift, which increases the H&S risk of this approach.
- Even with 11.5mm anti bandit glass, GIS requires the case frame and linings to be metal, where currently these cases are timber framed.

Locks

New locks to be supplied and/or existing historical locks to be reconditioned to working order:

- If existing Historical Locks are to be maintained, they will require to be reconditioned and have rear blanking plates fitted to reduce leakage through the keyholes.
- If replacement (new locks), the cases are to be fitted with 2 x locks per master leaf door. Locks are to be fitted to the interior of each door frame so that the outer face of the door maintains current appearance. New locks are to have rear blanking plates to reduce leakage through the keyholes. Lock specification to be agreed with the Horniman in advance of purchase and installation. The Horniman do not have a contracted locksmith.

Lighting

Provide new, modern lighting to the showcases which gives flexibility (adjustable focus / positioning). Lighting to be LED (light emitting diode) with drivers located in accessible, well ventilated but discreet locations. Allowance for lighting control should be factored in for additional functionality and flexibility.

Specification to be agreed with the Horniman on appointment.

Contractor to allow for:

- Contractor to undertake full photographic and measured survey of existing supporting structure (base, wall hanging, head of case) as part of works.
- Provision of construction drawings prior to work commencing.
- Provision of as-built drawings upon completion.

- Completion of a full report at the end of the process, detailing 'lessons learned' from the process. This will form the brief for the contractor who undertakes any further works.
- Phasing the work as follows; 1) a survey, appraisal of the works planned and manufacturing drawings, 2) mock-ups prepared ahead of the work to demonstrate the approach, for example where case seals are required to be cut into the existing timber frames of the cases, 3) Careful dismantling of the cases with any parts taken off site (as per statement to Historic England / Local Planning Authority). 4) Reassembly / installation.
- Temporary props / stays to support the adjacent cases whilst the trial cases are dismantled. These should be fitted before dismantling the trial cases.
- Where possible, the work to the cases should take place on site. Where this is not possible, the methodology required will need to state this and that HE and the LPA will be provided with the address and timescales for the absence.
- A full method statement will be required for approval of the client and for LBC, prior to starting works.
- Allow for the provision of samples of all finishes to be used.
- Details of fixtures and fittings, e.g. hinges, locks, are to be supplied to the designer for approval prior to procurement.
- All MDF to be Zero-Formaldehyde (ZF), to be sealed with 4no. layers of Dacrylate and painted to all surfaces (including cut edges).
- No fixings or adhesive should be visible.
- No sharp corners to be left.
- Any exposed timber at the end of the works will require finishing / refinishing to be visually identical to the existing.
- Working conditions during refurbishment – the works will happen whilst the rest of the gallery is still operational.
- Contractors to provide detailed explanation as to how the work will be conducted safely and with minimal disruption to the visitors.
- CDM risk registers and RAMS will be required for review and comment.
- Note that all exhibits will be removed by the museum curators.
- Asbestos survey to be allowed for.
- Coordination with the Horniman, Architectural Design Team and Exhibition Design Team.
- Meeting to visually inspect the exposed West Wall once cases have been removed (attendees TBC).
- Access to be allowed for cleaning / removing debris from the bottom of the 50mm ventilation void behind the case, every c.6months - access will need to be through internal structure. Detail of this TBD once cases are opened up and existing structure is known.
- Provide hoarding and protection to the floor and surrounding cases, with proposals to be agreed by the Horniman in advance of works being carried out.

Report

At the end of the refurbishment, the Contractor will produce a full report detailing the 'lessons learnt' during the process.

Programme

- Perform the Services necessary for completion of the works in line with the project programme.
- Participate in the operation of an early warning system whereby the Contractor shall notify the Client, Project Manager, other consultants and contractor as soon as the Contractor is aware of a matter that may adversely affect the project or its performance.
- Perform the Services necessary for completion of the Works in line with the project programme.
- Oversee and monitor the production of design information against the design programme and if delayed use reasonable endeavours to expedite the production of the information.
- Input into development of the exhibition programme to inform the wider master programme for the project and regularly review.

Meetings

- Attend meetings and visit Site to properly progress the works to ensure the successful completion of the Project and mitigate any delays or additional costs. Meetings will include, but not be limited to, Client meetings, project and design meetings, site progress meetings and other meetings called by the Project Manager.
- Give to the Client reasonable prior notice of and invite the Client to attend all meetings called by the Consultant in relation to the Project; attend all meetings called by the Client, the Project Manager and the Other Consultants in relation to the Project as appropriate/ reasonable.
- Keep full and proper records of all key meetings and negotiations attended or conducted by the Consultant and make the same available for inspection by the Client forthwith on request.

Standards and Guidance

- Comply with all relevant provisions for exhibition design and care of collections contained in the following UK national standards for museum collections:

Additional ('Out-of-Scope') Services

The Client may from time to time in writing instruct the Contractor to carry out the following services set out below. Such services are out-of-scope, and, accordingly, shall attract an additional fee computed in accordance with the Rates Schedule unless they are required due to the fault of the Contractor or those acting on their behalf. These fees shall be agreed in advance of any work being carried out and may include the following:

- Modify and review any design, specification, drawing or other document prepared in whole or in part by the Contractor following a significant change to the project brief.
- Provide such services which are not included in the Scope of Work as may be necessary if at any time, before the completion of the Trial Refurbishment or any part thereof, any materials, plant or equipment, whether incorporated in the Trial Refurbishment or not, shall be materially damaged or destroyed.
- Perform such other duties which are not included in the Scope of Work as may be reasonably requested by the Client to secure the successful completion of the Trial Refurbishment.
- Provide such assistance as the Client may reasonably require in pursuing each and every remedy which the Client may have against the Contractor(s) or Consultants following the issue of any writ or notice of arbitration, provided the Contractor is not otherwise party to such proceedings.
- Provide such assistance as the Client may reasonably require in defending any claim made against them by the Contractor following the issue of any writ or notice of arbitration, provided the Contractor is not otherwise party to such proceedings.

Appendix B

Form of Tender

(Please complete and return with your tender response)

Form Of Tender

Project: Horniman Museum and Gardens

Professional Service: Historic Showcase Trial Refurbishment

Name of Tenderer:

To: Kirsten Walker, Horniman Museum and Gardens

Please complete the following:

1. Fee Offer
 - I. Fee
 - II. Resources
 - III. Impact of Development Phase Programme Extension
2. Day Rates
3. Expenses and Disbursements
4. Offer Period
5. Declaration
6. Anti-Fraud and Bribery Statements

I/ We, the undersigned, do hereby offer to execute and complete the above professional services in strict accordance with the Appointment Brief and the Schedule of Services for the lump sum and percentage fees outlined below. For clarity, fee basis to be as follows unless otherwise stated:

Lump sum fee

I. Fee

Job Title	Fee
Total	

Note that the appointed consultant shall produce a monthly payments schedule to be agreed with the Project Manager which reflects these figures (on a pro-rata adjustment).

II. Resources (Development Stage Only)

Job Title	Resource (in Resource Days)
Total Resource (Resource Days)	

III. Impact of Programme Extension

Please confirm the impact on fees if the scope remains the same but the programme extends

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.....

2.0 Day Rates

Contractor	Rate (£/day)
Role	
Role	
Role	

The above day rates will be utilised to negotiate any additional works that may be required if deemed to be beyond the reasonable scope of the works specified.

Your fee offer and all day rates are to be based on a 7.5 hour day and are to include allowance for disbursements but to exclude VAT.

3.0 Expenses and Disbursements

The fee offer is to include all expenses and disbursements (including printing charges). The percentage allowed for expenses within the fee offer above is _____ %

4.0 Offer Period

This tender/offer is to remain open for a period of 16 weeks from the date fixed to the return of tenders.

5.0 Declaration

Dated this day of

Name of the lead firm or company.....

Address.....

.....

.....

Contact Tel Nr.....

Contact Fax Nr.....

Contact E-mail address.....

Signature.....

Name.....

Capacity in which sign.....

No undertaking is given to accept the lowest or any tender.

6.0 Anti-Fraud and Bribery Statements

Certificate of Non Canvassing

I/We hereby certify that I/We have not canvassed or solicited any Member, Officer, Employee, Agent or Contractor of the Business in connection with the award of this Bid or any other Bid or proposed Bid for the Services and that no person employed by me/us or acting on my/our behalf has committed any such act.

I/We further hereby undertake that I/We will not in the future canvass or solicit any Member, Officer, Employee, Agent or Contractor the Business in connection with the award of this or any other Bid or proposed Bid for the provision of Services and that no person employed by me/us or acting on my/our behalf will commit any such act.

I/ We acknowledge that if we have acted or act in contravention of this Certificate of Non Canvassing then the Business shall be entitled to reject our response to this invitation to bid, or any subsequent bid, or after award of any contract pursuant to this bid process may rescind that contract, and that if such rejection or rescission occurs we will indemnify the Business in full against all loss and expenses arising out of or in connection with such rejection or rescission.

Form Completed by:

Signed (1): _____

Status: _____

Signed (2): _____

Status: _____

For and on behalf of: _____

Date: _____

Conditions of Bona Fide Bid

We certify that this is a bona fide bid, intended to be competitive and that we have not fixed or adjusted the amount of the bid or the rates and prices quoted by or under or in accordance with any agreement or arrangement with any other person.

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

- Communicating to a person other than the Business the amount or approximate amount of our proposed Bid (other than in confidence in order to obtain quotations necessary for the preparation of the Bid or for any insurance purposes);
- Entering into any agreement or arrangement with any other person that he shall refrain from bidding or as to the amount of any bid to be submitted;
- Offering or agreeing to pay or give or paying or giving any sum of money, inducement or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other Bid or proposed Bid for the Services any act or omission;
- commit an offence under the Prevention of Corruption Acts 1889 to 1916;
- commit an offence under the Bribery Act 2010.

In this certificate, the word “person” includes any person, body or association, corporate or unincorporated and “agreement” includes any arrangement whether formal or informal and whether legally binding or not.

We acknowledge that if we have acted or act in contravention of these Conditions of Bona Fide Bid then the Business shall be entitled to reject our bid, or after award of any contract pursuant to this bid process may rescind that contract, and that if such rejection or rescission occurs, we will indemnify the Business in full against all loss and expense arising out of or in connection with such rejection or rescission.

Form Completed by:

Signed (1): _____

Status: _____

Signed (2): _____

Status: _____

For and on behalf of: _____

Date: _____

Statement of Acceptance of Business Policies

To The Business:

I/We certify that I/We undertake to meet all the provisions of the Business's Policies and Procedures in delivering any services that I am/we are successful in tendering for.

I/We acknowledge that these maybe amended from time to time as required to meet changes in legislation or guidance and that I am/we are required to comply with the latest version of any policy/procedure at any time.

I/We certify that I/We will not in pursuance of compliance with the requirements of this statement raise any charge outside the agreed contract price for any measures taken unless this has been agreed formally with the Business's authorised officers.

Signed:

(1)

Position:

(2)

Position:

Date:

Appendix C

Historic Showcase Trial Refurbishment Brief

Nature + Love - Horniman Museum and Gardens

Natural History Gallery - Trial Case Refurbishment

Brief prepared by Studio MB, 16th Nov 2022



- 1

As part of the Nature + Love project, the possibility of refurbishing the historic showcases in the Natural History Gallery is being explored. This is to improve their Airtightness (AER), Relative Humidity control, Security, Lighting and general suitability for artefact display. A summary of the Options available for this has been included on a seperate sheet. This brief relates to a trial refurbishment of one of the cases.
- 2

The oldest cases are built from mahoghany, but it is not yet known which the oldest cases are. There is not a great deal of detail about how the cases are built, fixed to the wall, or held up, because there is very limited record / evidence at this stage except for the physical changes that can be seen. Therefore it is not known exactly how much they can be improved/altered/moved to minimise the impact on any original fabric of significance. At this stage in the project, the requirement for a trial has been identified to determine how effective the planned refurbishments could be, and what exactly would be involved, in order for the impact to be assessed for the whole gallery. The intention is that one case undergoes the planned modifications, which would be permanent. The Air Exchange Rate (AER) in the cases will be trialed before and after the works to determine the degree of improvement.
- 3

The cases that have been identified for this trial sit within Bay 4, to the North-West, ground floor corner of the gallery. They represent the typical 'case type' that is being considered for refurbishment, being hinged glazed doors to fitted carcasses. The following pages describe the existing condition of the cases, as well as the intended modifications:

NHG 83 007 - Location Plan

NHG 83 001 - Bay 4, as Existing (drawings)

NHG 83 002 - Bay 4, as Existing (photos)

NHG 10 002 - Bay 4, Dismantling

NHG 83 005 - Proposed Modifications to cases 48-53

NHG 83 006 - 3D View of Proposed Modifications to cases 48-53
- 4

*Note, English Heritage undertook a test on some of the cases in the gallery in 2019, including cases 45-47 (just adjacent to the ones we are proposing for the trial), which provides good detail about where the are leaks are and how best to mitigate these. This report is attached for reference.

The cases in the gallery are covered by the Grade II* listed status of the building. As such the works required as part of this trial will need Listed Building Consent. The intention is that this brief can serve as a basis for this pre-app discussion.

- 5

A secondary part of this trial is the opportunity to visually inspect the condition of the West Wall of the galleries, whilst the interior of the cases is being taken apart. RH readings indicate that this area is more humid, possibly the result of hygroscopicity in the external wall on the west elevation, however because the cases are fitted in front of the wall it has been impossible to determine the extent of this issue. Whilst the case refurbishment test is being undertaken and panels / parts are removed for replacement, there is the opportunity to see in directly to this wall surface. Coordination with the Architectural Design Team will be required to ensure that the appropriate people are available at the right time in the works to see in to the wall.
- 6

We are not aware of the presence of Asbestos in the historic showcases and an asbestos survey has not been carried out, neither is an asbestos management report available for this particular area. An asbestos survey will be required prior to dismantling.

Aims Of Refurbishment

- 7

Conservation

The refurbished cases should look very similar to the existing cases. Improvements should be justifiable and as discreet as possible. Any exposed timber at the end of the works will require finishing / refinishing to be visually identical to the existing. Repairs to existing sign-written case numbers may be required.
- 8

Environmental Control

Target Relative Humidity - 50% +/- 5% / 24 hrs

Target Air Exchange Rate 0.1 / 24 hrs

Sealed case environment to control dust and pest ingress, as is currently experienced at the museum. Marvel seal (or equal approved) to be used to case carcass.
- 9

Notes from English Heritage Report (24th Sept 2019):

The ability of the case to condition to 50% RH +/- 5% RH will depend on the room RH seasonal variation, the AER of the case and the volume of Prosorb. The room RH seasonal variation and AER will affect how often the Prosorb requires reconditioning. Whilst refurbishment of some historic cases has achieved 0.1 AER, based on previous experience a higher AER is more likely. An AER of 0.4 would still be acceptable to provide passive control using Prosorb. For higher AERs the Prosorb may need reconditioning more regularly.

Display cases are not able to passively control temperature conditions. To control to 19°C +/- 2°C is likely to require some form of room environmental control (note, temperature control is not part of the Aims of Refurbishment).
- 10

Security

Upgrade the cases so that they are more difficult to get in to. New locks to be supplied and/or existing historical locks to be reconditioned to working order - to be discussed further with HMG upon appointment. It is assumed that the cases already have security film fitted to the glass.

Note that achieving Government Indemnity Scheme (GIS) Security standard for the refurbished cases is unlikely to be possible.

• Using 11.5mm anti bandit glass will make the glazed panels much heavier than they are currently, and will require additional structure to support this additional weight. The lift-off panels will also be much more difficult to lift, which increases the H&S risk of this approach.

• Even with 11.5mm anti bandit glass, GIS requires the case frame and linings to be metal, where currently these cases are timber framed.
- 11

Studio MB suggest that in addition to the refurbishment works, a number of new cases could be provided as part of the project which can be made to satisfy the GIS security and environmental control standards.

These cases would be the ones in which GIS loans are displayed. The majority of the other cases would be comprised of the refurbished historic cases, which though not up to full GIS standard, would provide an improved degree of environmental control and security.
- 12

Lighting

Provide new, modern lighting to the showcases which gives flexibility (adjustable focus / positioning). Lighting to be LED (light emitting diode) with drivers located in accessible, well ventilated but discreet locations above the cases. Allowance for lighting control should be factored in for additional functionality and flexibility. Spec to be agreed with HMG on appointment.

Contractors to allow for:

- Contractor to undertake full photographic and measured survey of existing supporting structure (base, wall hanging, head of case) as part of works.

Provision of construction drawings prior to work commencing.

Provision of as-built drawings upon completion.

Completion of a full report at the end of the process, detailing 'lessons learned' from the process. This will form the brief for the contractor who undertakes any further works.

Phasing the work as follows; 1) a survey, appraisal of the works planned and manufacturing drawings, 2) mock-ups prepared ahead of the work to demonstrate the approach, for example where case seals are requiredto be cut in to the existing timber frames of the cases, 3) Careful dismantling of the cases with any parts taken off site (as per statement to HE / LPA). 4) Reassembly / installation.

Temporary props / stays to support the adjacent cases whilst the trial cases are dismantled. These should be fitted before dismantling the trial cases.

Where possible, the work to the cases should take place on site. Where this is not possible, the methodology required will need to state this and that HE and the LPA will be provided with the address and timescales for the absence.

A full method statement will be required for approval of the client and for LBC, prior to starting works.

Allow for the provision of samples of all finishes to be used.

Details of fixtures and fittings, eg hinges, locks, are to be supplied to the designer for approval prior to procurement.

All MDF to be Zero-Formaldehyde (ZF), to be sealed with 4no. layers of Dacrylate and painted to all surfaces (including cut edges).

No fixings or adhesive should be visible.

No sharp corners to be left.

Any exposed timber at the end of the works will require finishing / refinishing to be visually identical to the existing.

Working conditions during refurbishment – the works will happen whilst the rest of the gallery is still operational. Contractors to provide detailed explanation as to how the work will be conducted safely and with minimal disruption to the visitors.

CDM risk registers and RAMS will be required for review and comment.

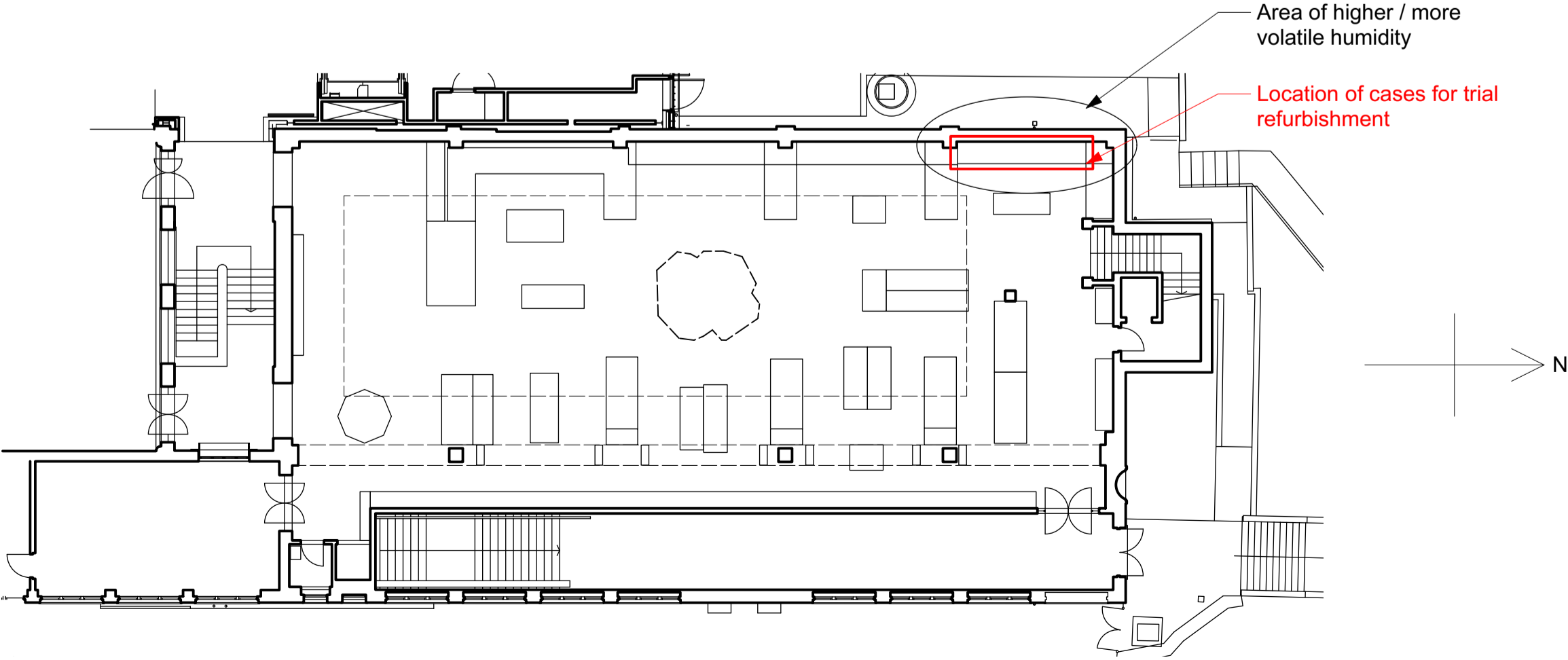
Note that all exhibits will be removed by the museum curators.

Asbestos survey to be allowed for.

Coordination with Architectural and Exhibition teams.

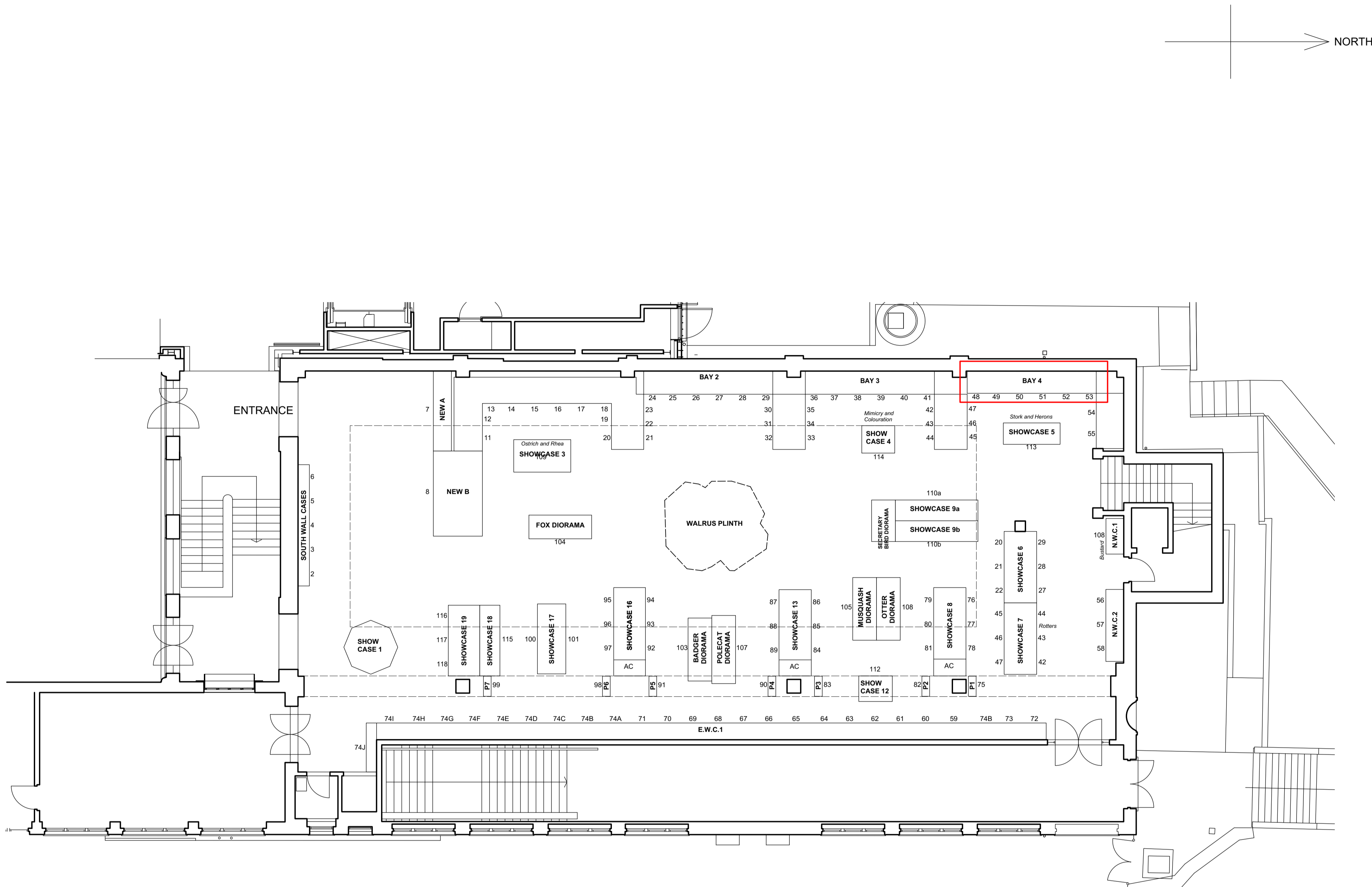
Meeting to visually inspect the exposed West Wall once cases have been removed (attendees TBC).

Access to be allowed for for cleaning / removing debris from the bottom of the 50mm ventilation void behind the case, every c.6months - access will need to be through internal structure. Detail of this TBD once cases are opened up and existing structure is known.



LOCATION PLAN, not to scale

Location Plan of Natural History Gallery indicating position of Cases 48-53



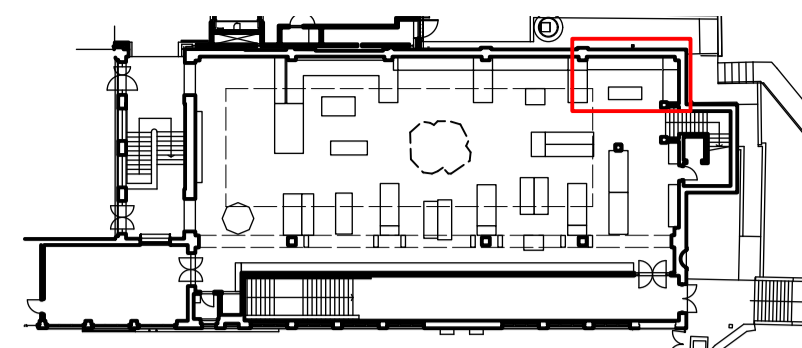
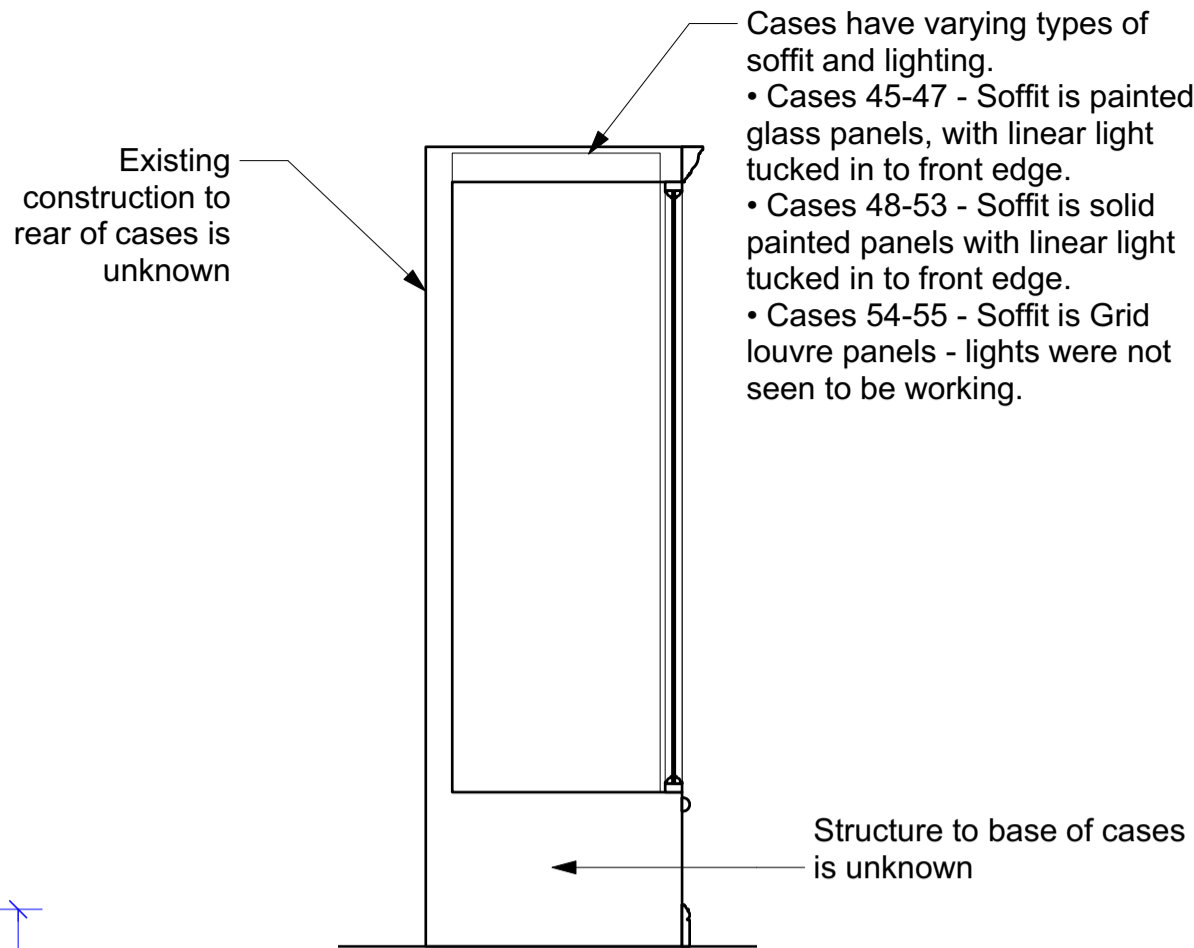
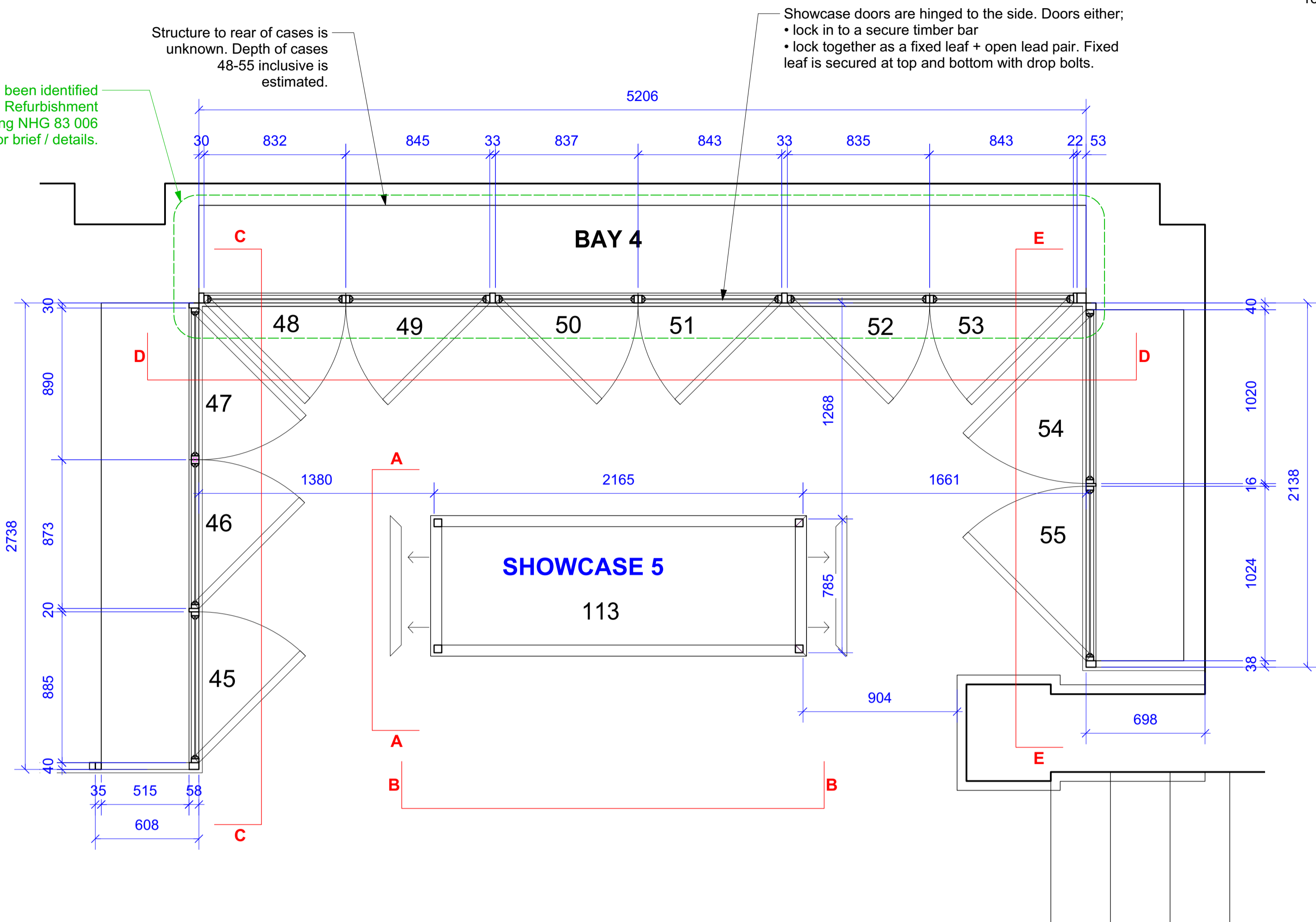
LOCATION PLAN 1:100 at A1

ADDITIONAL INFORMATION				
<div>AIMS OF REFURBISHMENT</div> <div>Refer to cover page of Briefing Document for further notes regards Aims of Refurbishment and Contractor requirements.</div>				
Rev	Date		By	Ch'd By
<div><div>This drawing is the intellectual property of Studio MB and is subject to copyright. © This drawing and the contents depicted are the copyright of Studio MB Ltd and may not be reproduced or amended except by written permission. The designers disclaim responsibility for variations from this drawing made without their written consent.</div><div>All proprietary goods and materials are to be fitted in accordance with manufacturers instructions and relevant Codes of Practice. All work to comply with relevant National Building Regulations. Notwithstanding all of the above, electrical work must comply with current I.E.E regulations (BS 7671) or equivalent. The contractor will be held responsible for the structural integrity of all fittings and fixtures supplied.</div><div>No dimensions to be scaled from this drawing.</div><div>Dimensions must be checked by Contractor.</div><div>All dimensions to be checked on site and against site conditions. Any variations between stated dimensions and site dimensions should be reported to the designer before work starts.</div><div>If in doubt refer to designer before work starts.</div><div>Samples of all finishes must be provided by the Contractor and approved by the designer before work starts.</div></div>				
Job Number: MB750		<div>StudioMB</div> <div>20 Hill St, Edinburgh, UK. EH2 3JZ. T: 0131 555 8355 E: hello@studiomb.co.uk</div>		
Status: For Tender				
Work Stage: Developed Design				
Page: 1/1	Page Size: A1			
Project Title: Nature + Love at the Horniman				
Drawing Title: NHG Case Test Brief - Location Plan				
Drawn by: MN	Checked by:	Date Drawn: 16/11/22	Scale AS NOTED	
Drawing No: NHG 83 007				Rev:

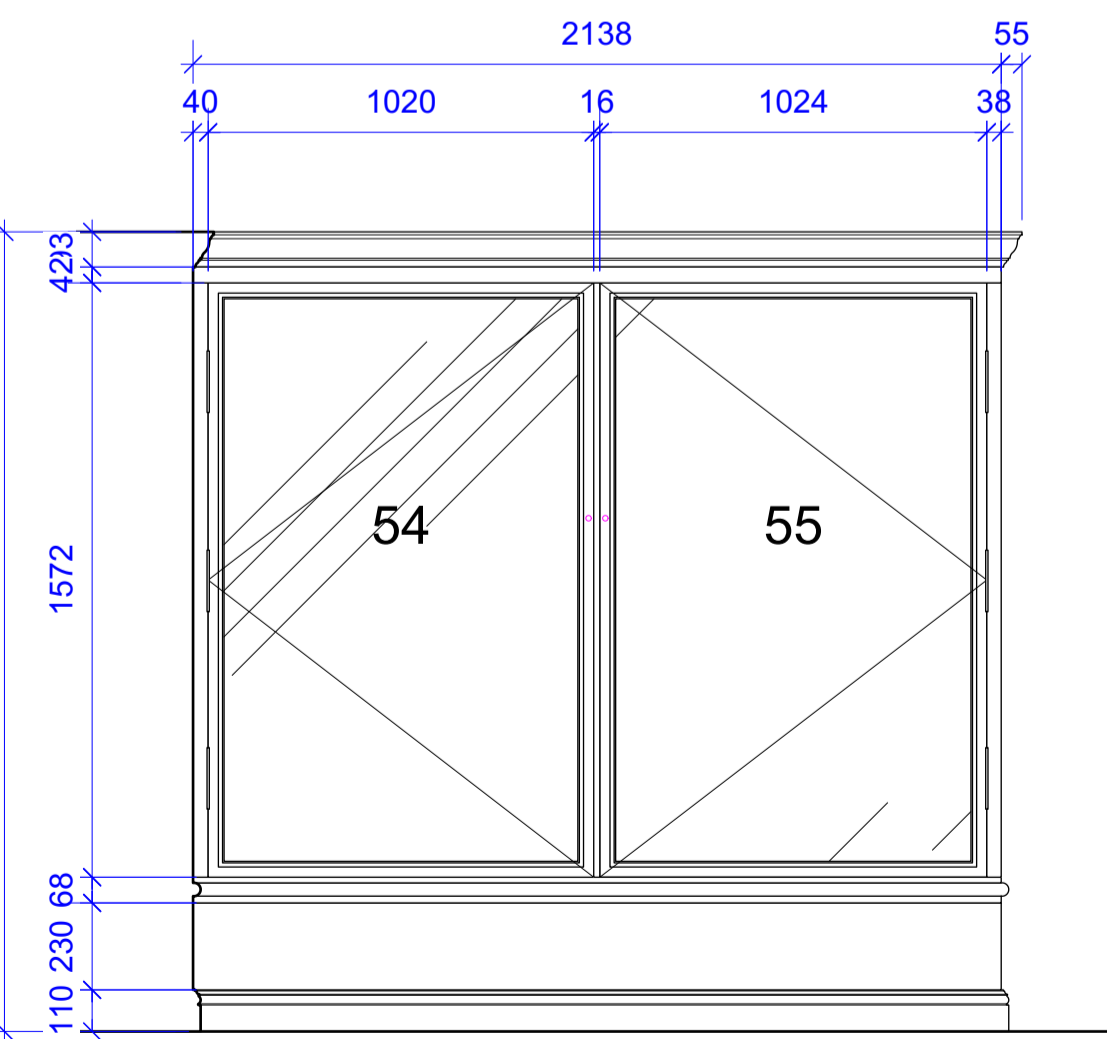
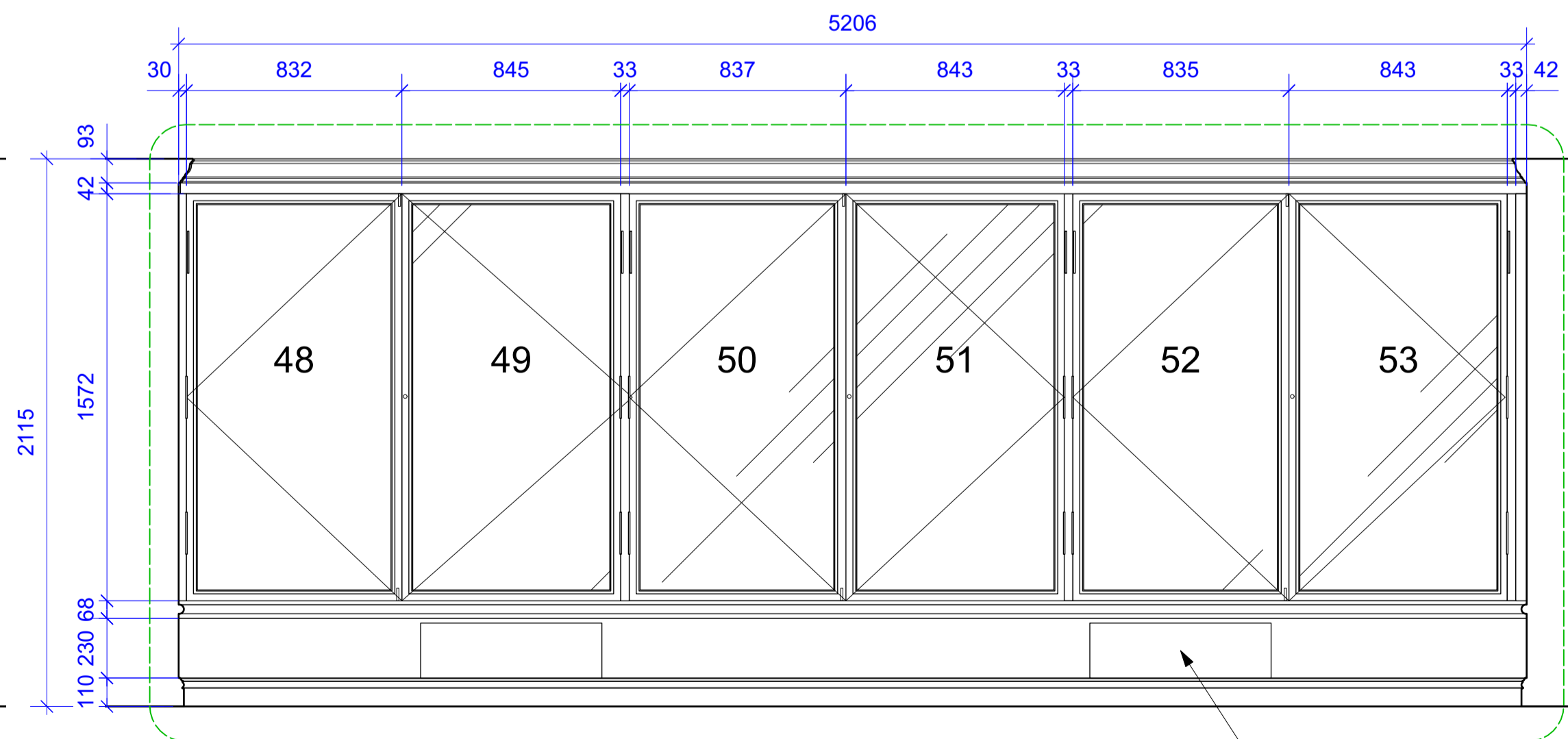
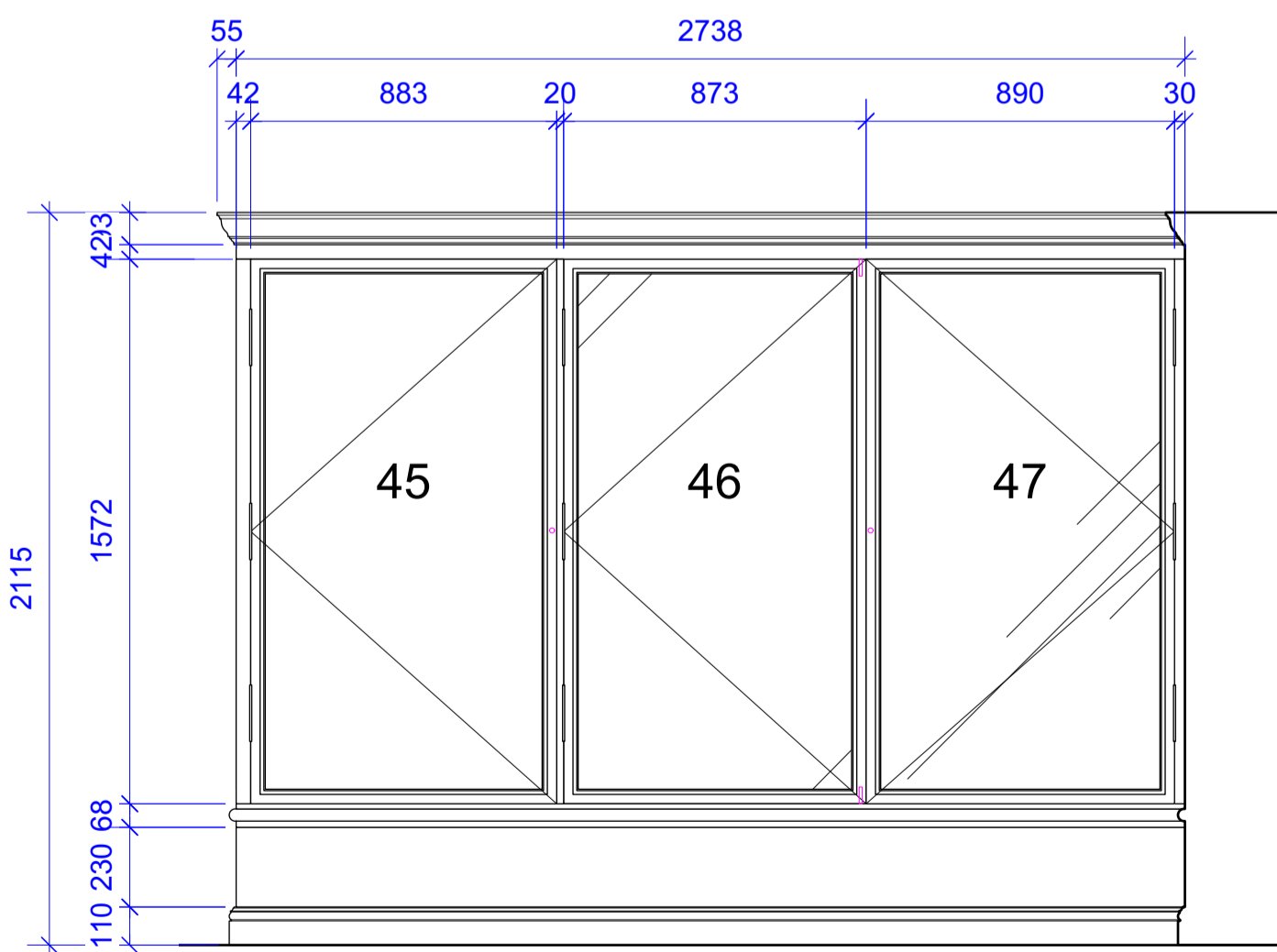
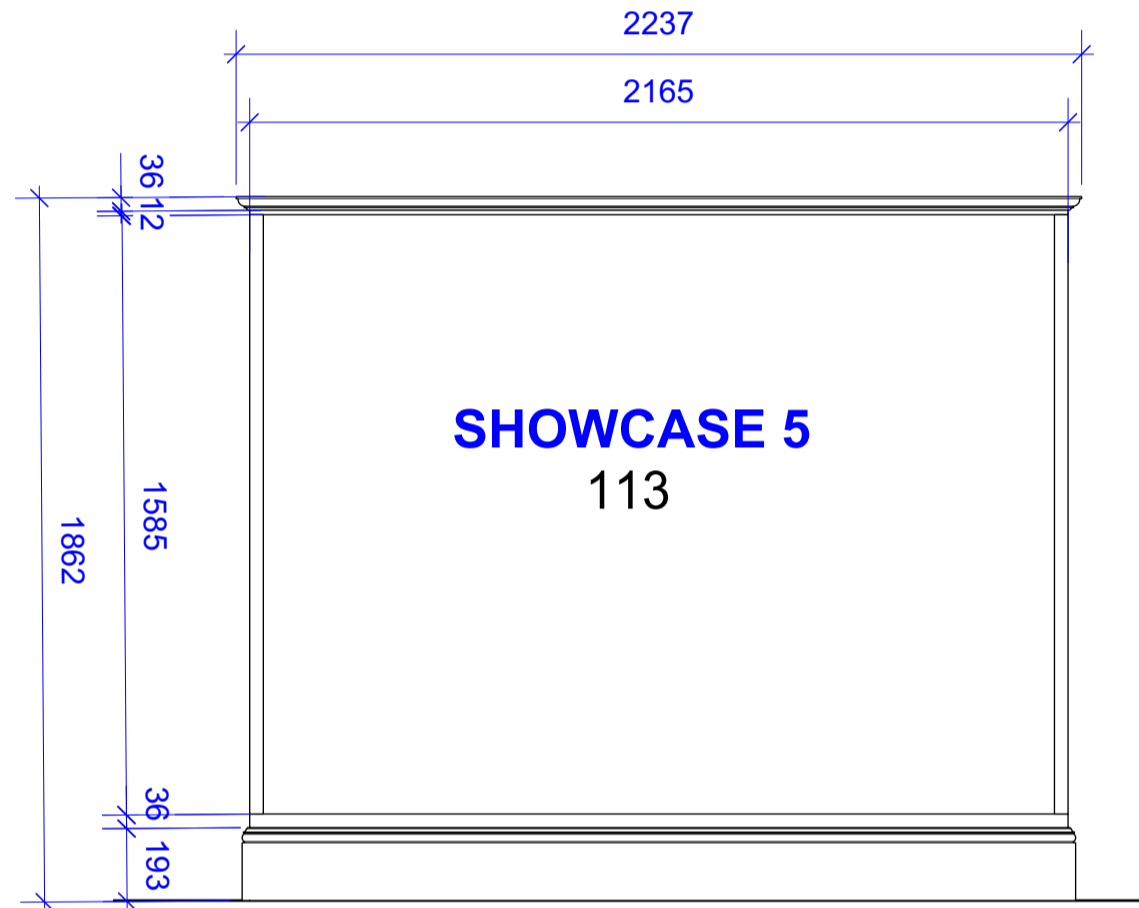
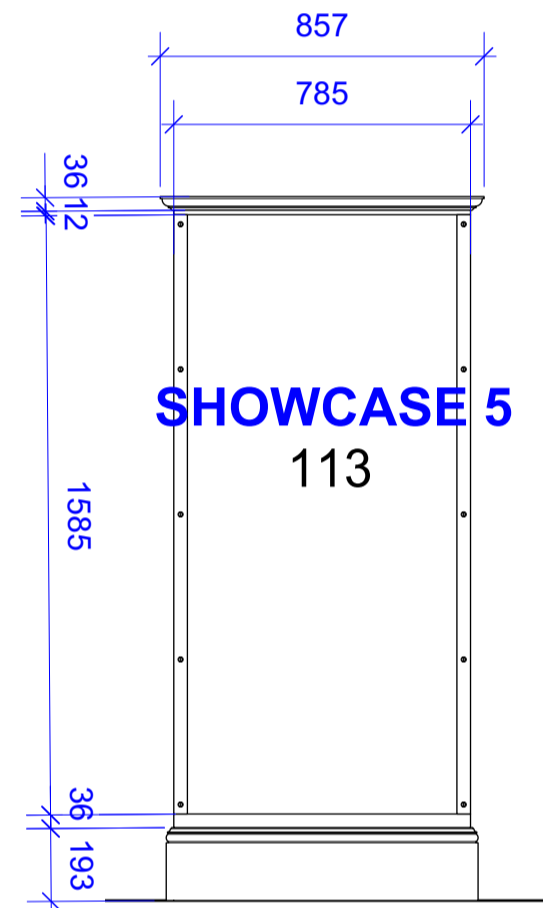
Bay 4 - Existing Showcases

Note, all sizes are recorded by Exhibition Designers and are provided for indicative information only. Contractors must undertake their own complete survey of the work area prior to starting.

This case has been identified for the Case Refurbishment Test. See drawing NHG 83 006 for brief / details.



LOCATION PLAN 1:500 at A1



Existing drawers below cases 49 and 52.

ADDITIONAL INFORMATION

Rev	Date		By	Ch'd By
A	11/08/22	Drawing has been updated to incorporate all comments received from client and architectural design team.	MN	
B	23/08/22	Drawing has been reissued as part of wider updates to the brief. No specific changes to this drawing.	MN	
C	16/11/22	Drawing has been reissued as part of wider updates to the brief- for tender. No specific changes to this drawing.	MN	

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No dimensions to be scaled from this drawing.

Dimensions must be checked by Contractor.

All dimensions to be checked on site and against site conditions. Any variations between stated dimensions and site dimensions should be reported to the designer before work starts.

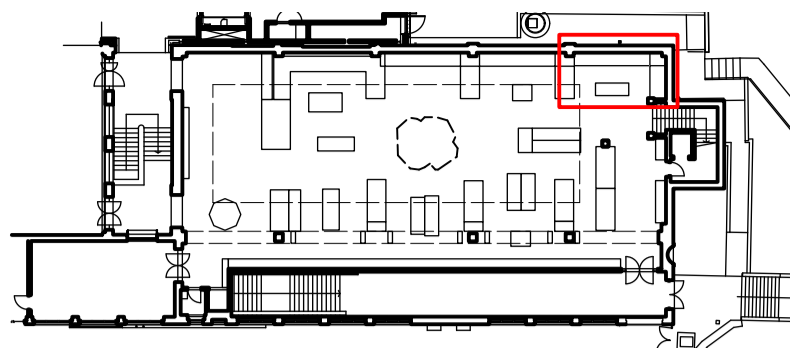
If in doubt refer to designer before work starts.

Samples of all finishes must be provided by the Contractor and approved by the designer before work starts.

Job Number: MB750		StudioMB	
Status: For Tender			
Work Stage: Developed Design		20 Hill St, Edinburgh, UK. EH2 3JZ. T: 0131 555 9355 E: hello@studiomb.co.uk	
Page: 1/1	Page Size: A1		
Project Title: Nature + Love at the Horniman			
Drawing Title: NHG Case Test Brief - Bay 4 As Existing			
Drawn by: MN	Checked by:	Date Drawn: 24/06/22	Scale AS NOTED
Drawing No: NHG 83 001 C			Rev: C

Existing Showcases

Photos used here are from SMB visit on 27th June 2022



LOCATION PLAN 1:500 at A1



^ Photos showing cases 48-53



^ Photos showing cases 48-53



^ Photo showing Bay 4 in its entirety



^ Photo showing Bay 4 in its entirety

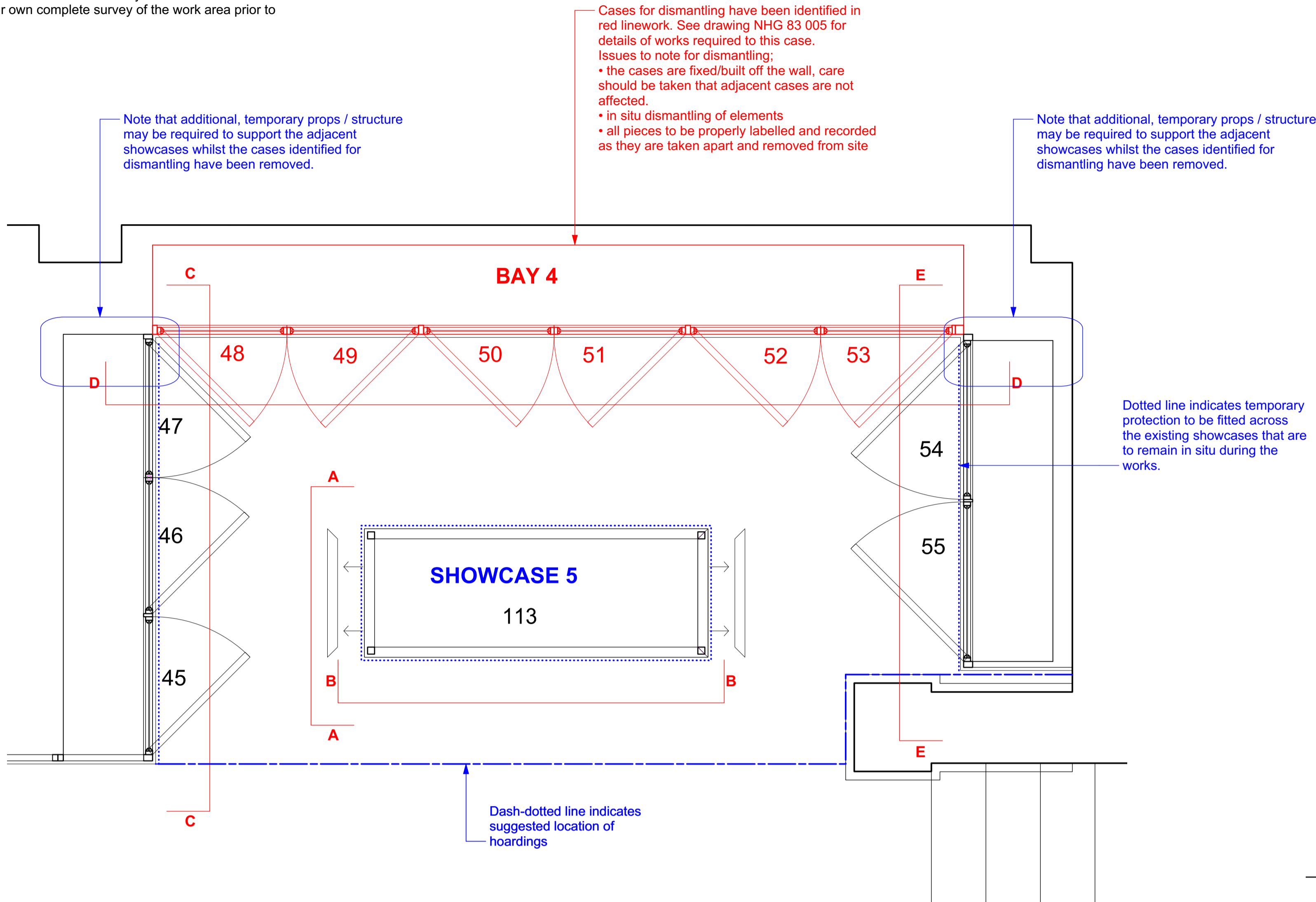


^ Photo showing soffit of cases 48-53

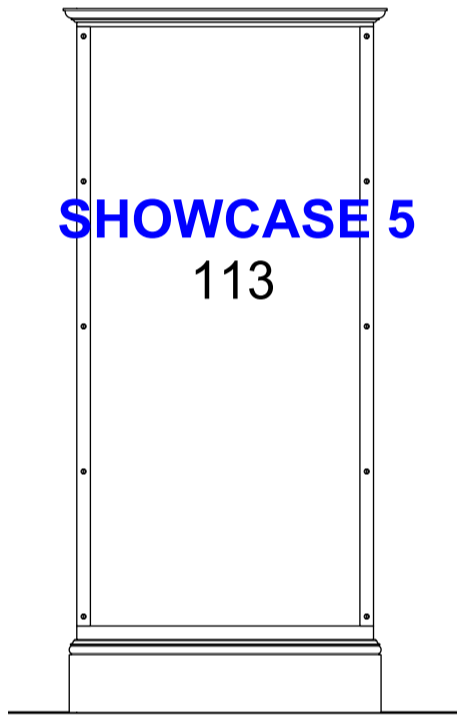
ADDITIONAL INFORMATION				
Rev	Date		By	Ch'd By
A	11/08/22	Drawing has been updated to incorporate all comments received from client and architectural design team.	MN	
B	23/08/22	Photos have been changed to show cases 48-53 specifically (photos of Bay 4 included still for context).	MN	
C	16/11/22	Drawing has been reissued as part of wider updates to the brief- for tender. No specific changes to this drawing.	MN	
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Job Number: MB750		<div>StudioMB</div> <div>20 Hill St, Edinburgh, UK. EH2 3JZ. T: 0131 555 8355 E: hello@studiomb.co.uk</div>		
Status: For Tender				
Work Stage: Developed Design				
Page: 1/1	Page Size: A1			
Project Title: Nature + Love at the Horniman				
Drawing Title: NHG Case Test Brief - Bay 4 As Existing Photos				
Drawn by: MN	Checked by:	Date Drawn: 24/06/22	Scale: AS NOTED	
Drawing No: NHG 83 002 C				Rev: C

Bay 4 - Dismantling Showcases

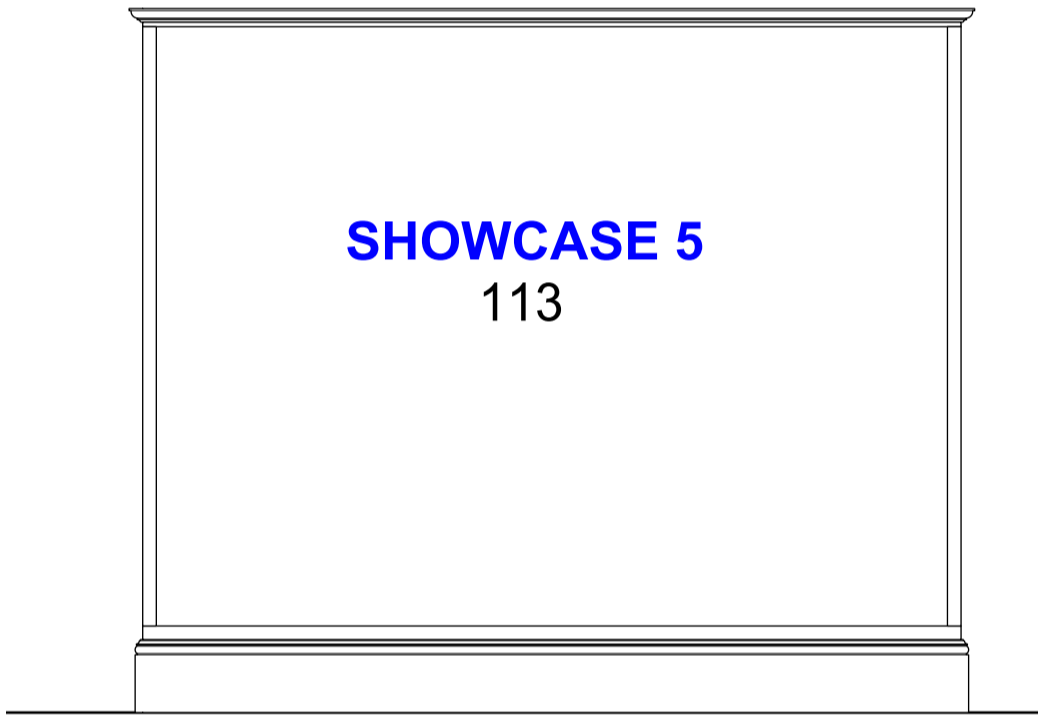
Note, all sizes are recorded by Exhibition Designers and are provided for indicative information only. Contractors must undertake their own complete survey of the work area prior to starting.



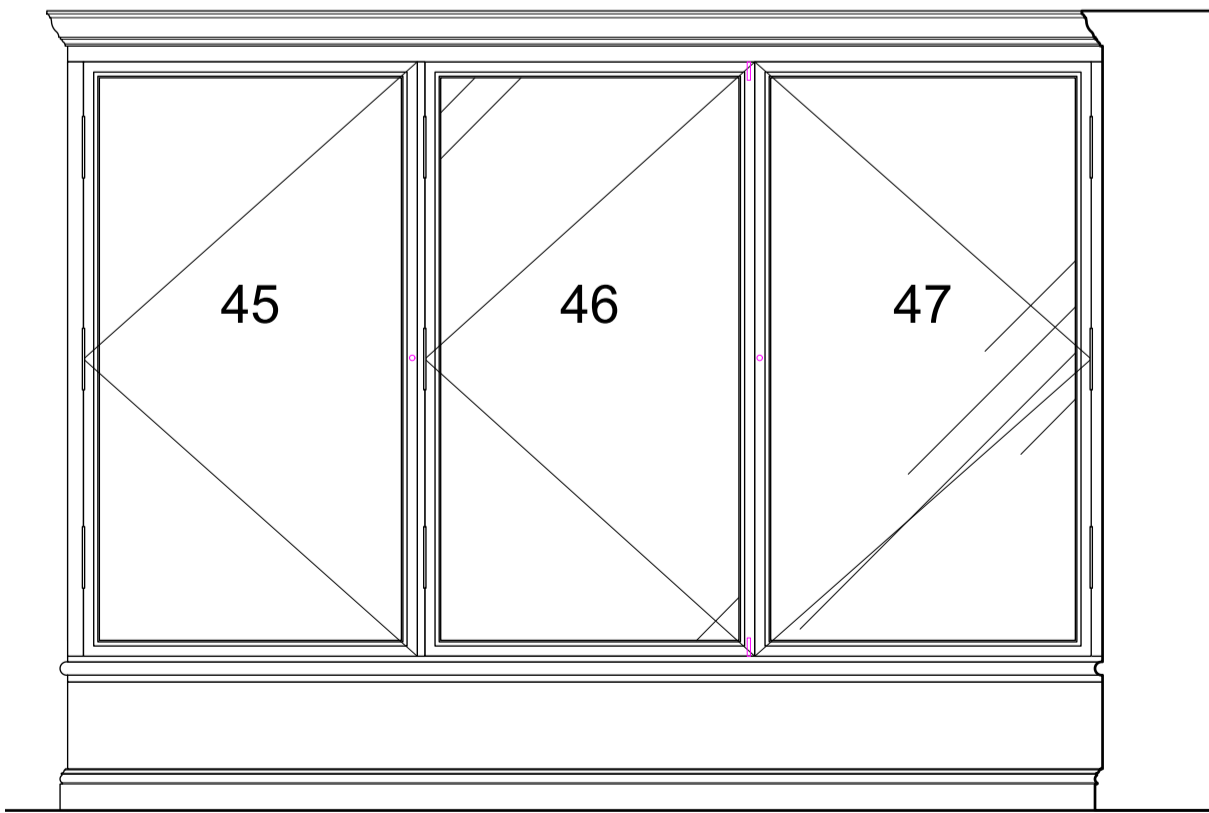
PLAN 1:20 at A1



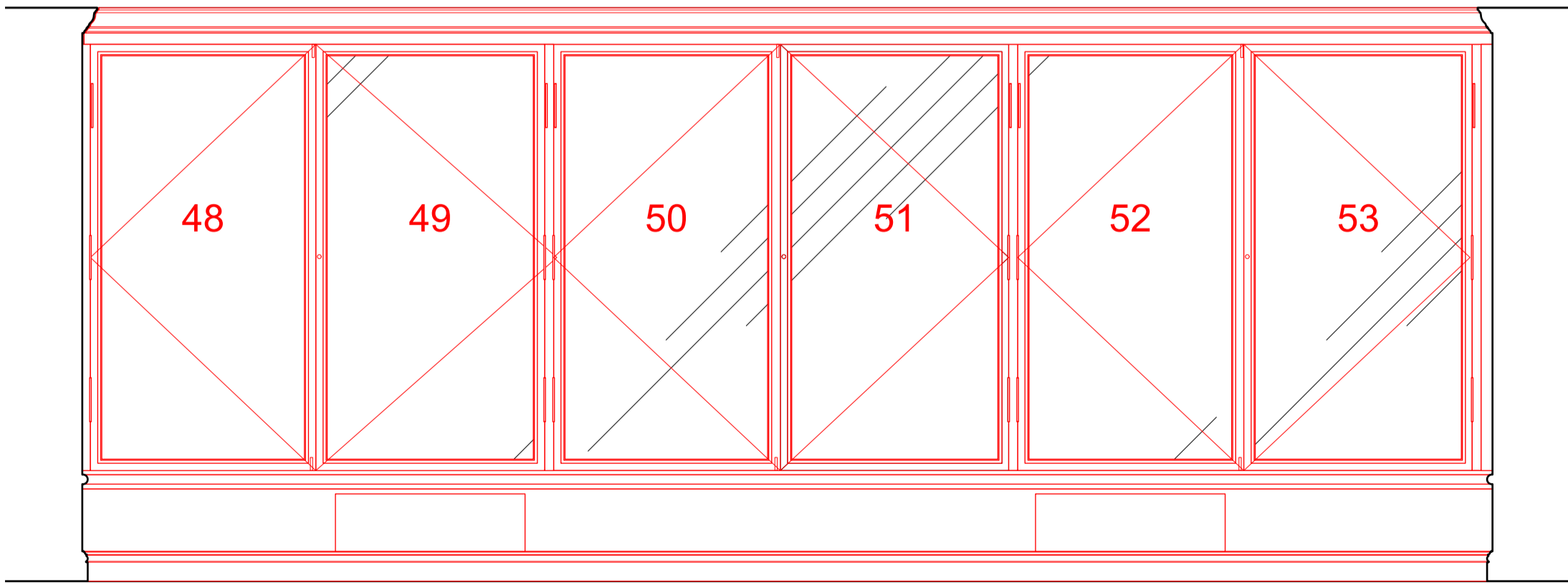
ELEVATION A
1:20 at A1



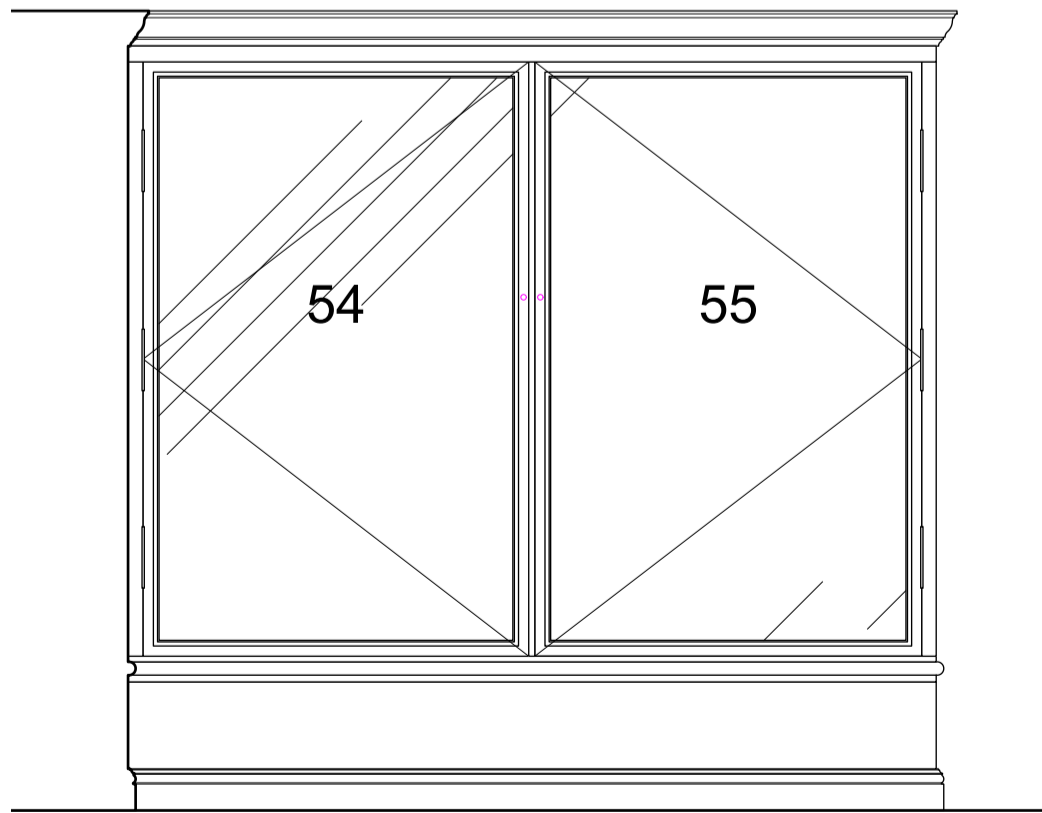
ELEVATION B
1:20 at A1



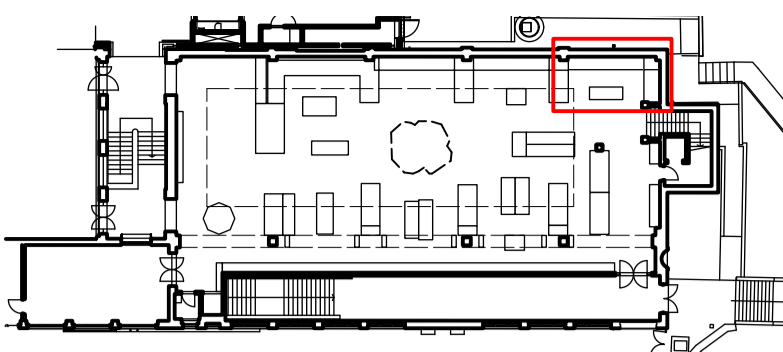
ELEVATION C 1:20 at A1



ELEVATION D 1:20 at A1



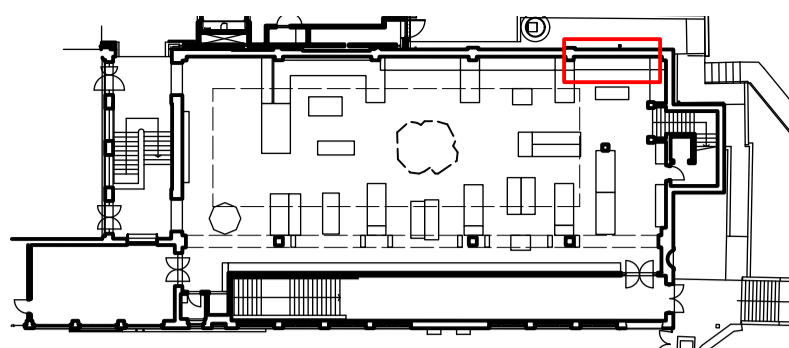
ELEVATION E 1:20 at A1



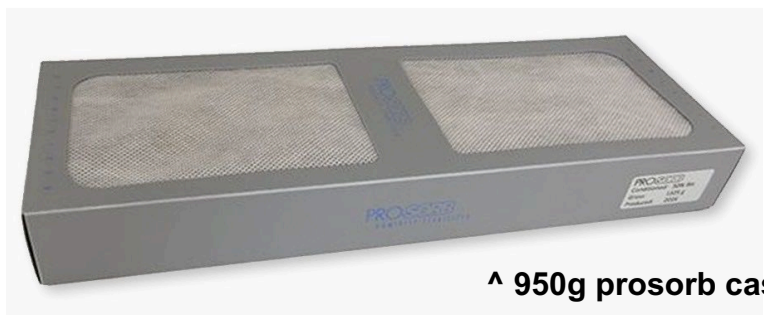
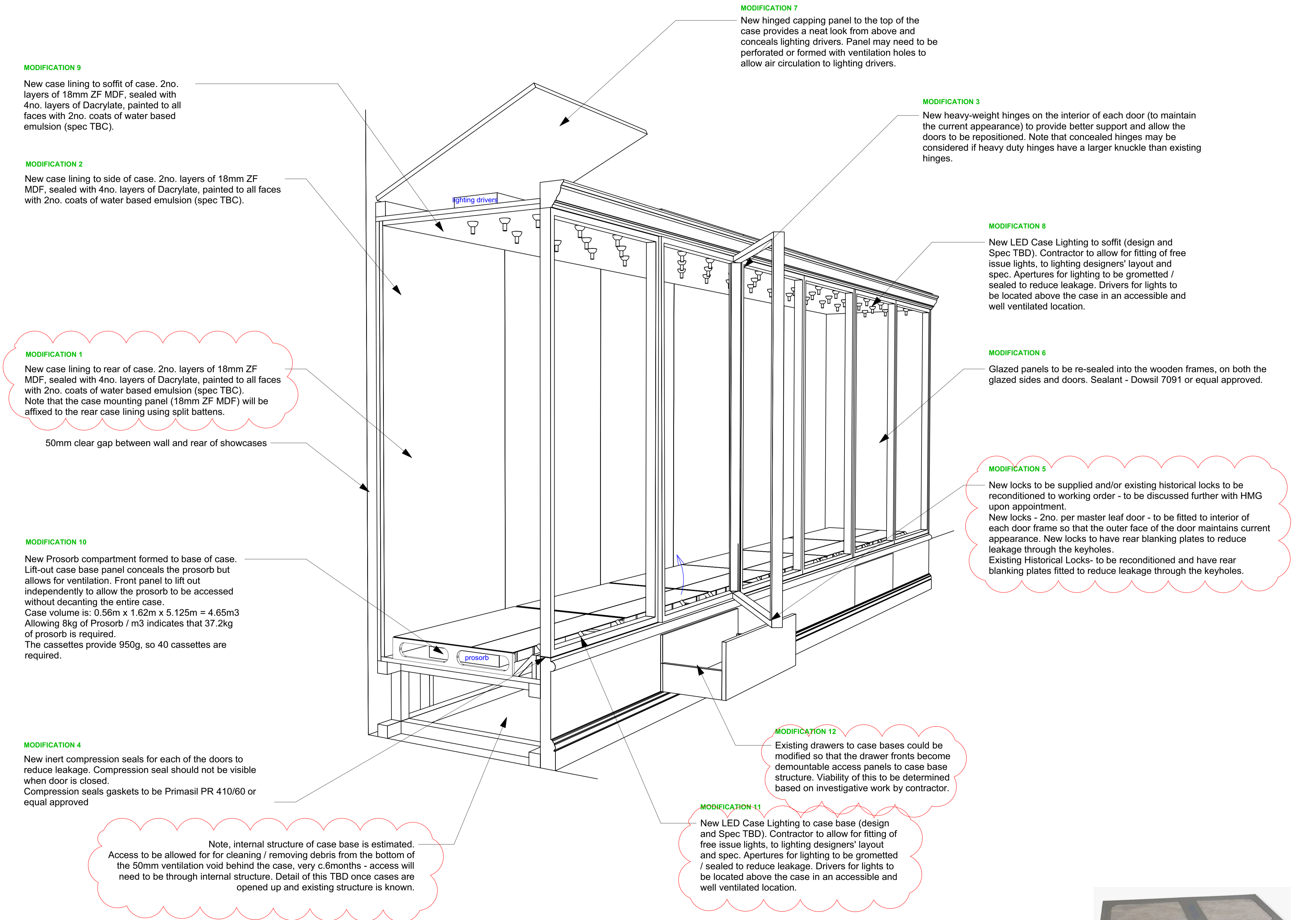
LOCATION PLAN 1:500 at A1

ADDITIONAL INFORMATION				

Bay 4 - Proposed Modification to Cases 48-53



LOCATION PLAN 1:500 at A1



^ 950g prosorb cassette

ADDITIONAL INFORMATION					
AIMS OF REFURBISHMENT Refer to cover page of Briefing Document for further notes regards Aims of Refurbishment and Contractor requirements.					

Bay 4 - Proposed Modification to Cases 48-53

MODIFICATION 2

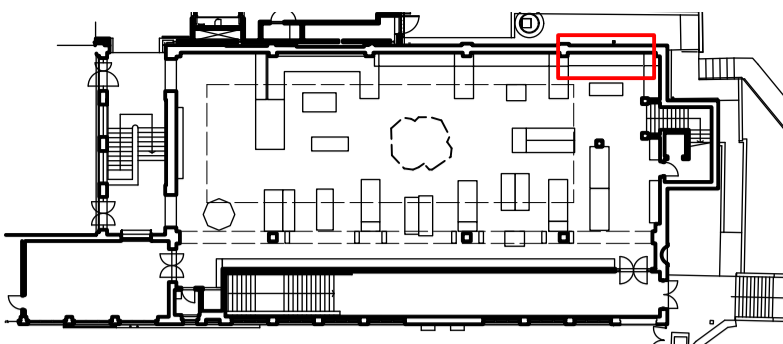
New case lining to side of case. 2no. layers of 18mm ZF MDF, sealed with 4no. layers of Dacrylate, painted to all faces with 2no. coats of water based emulsion (spec TBC).

MODIFICATION 1

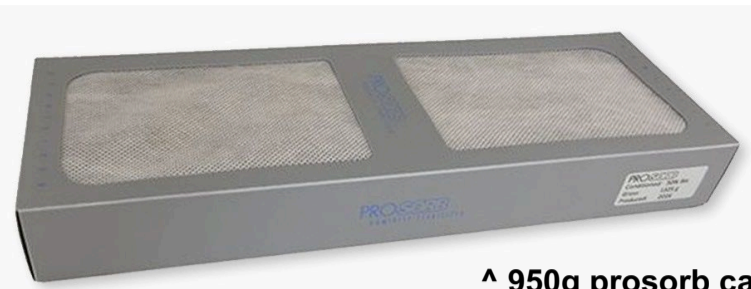
New case lining to rear of case. 2no. layers of 18mm ZF MDF, sealed with 4no. layers of Dacrylate, painted to all faces with 2no. coats of water based emulsion (spec TBC). Note that the case mounting panel (18mm ZF MDF) will be affixed to the rear case lining using split battens.

Note to HMG, AER to be tested and recorded by HMG (via English Heritage as before?) prior to the refurbishment works taking place. It can then be tested afterwards to confirm the success or otherwise of this approach.

Pink dash-dot line indicates case seal. Seal to be achieved by contractor using Marvel seal (or equal approved) to be used to case carcass. Note that any holes formed in this for fixings need to be sealed in turn.



LOCATION PLAN 1:500 at A1



^ 950g prosorb cassette

PLAN 1:10 at A1

MODIFICATION 3

New heavy-weight hinges on the interior of each door (to maintain the current appearance) to provide better support and allow the doors to be repositioned. Note that concealed hinges may be considered if heavy duty hinges have a larger knuckle than existing hinges.

MODIFICATION 4

New inert compression seals for each of the doors to reduce leakage. Compression seal should not be visible when door is closed. Compression seals gaskets to be Primasil PR 410/60 or equal approved

MODIFICATION 5

New locks to be supplied and/or existing historical locks to be reconditioned to working order - to be discussed further with HMG upon appointment. New locks - 2no. per master leaf door - to be fitted to interior of each door frame so that the outer face of the door maintains current appearance. New locks to have rear blanking plates to reduce leakage through the keyholes. Existing Historical Locks- to be reconditioned and have rear blanking plates fitted to reduce leakage through the keyholes.

MODIFICATION 6

Glazed panels to be re-sealed into the wooden frames, on both the glazed sides and doors. Sealant - Dowsil 7091 or equal approved.

Note, 50mm clear gap to be retained for ventilation between the rear of the showcase structure and the wall of the gallery. Vertical studs can be used (details to be agreed), provided ventilation is allowed for.

MODIFICATION 7

New hinged capping panel to the top of the case provides a neat look from above and conceals lighting drivers. Panel may need to be perforated or formed with ventilation holes to allow air circulation to lighting drivers.

MODIFICATION 8

New LED Case Lighting to soffit (design and Spec TBD). Contractor to allow for fitting of free issue lights, to lighting designers' layout and spec. Apertures for lighting to be grommetted / sealed to reduce leakage. Drivers for lights to be located above the case in an accessible and well ventilated location.

MODIFICATION 9

New case lining to soffit of case. 2no. layers of 18mm ZF MDF, sealed with 4no. layers of Dacrylate, painted to all faces with 2no. coats of water based emulsion (spec TBC).

Pink dash-dot line indicates case seal. Seal to be achieved by contractor using Marvel seal (or equal approved) to be used to case carcass. Note that any holes formed in this for fixings need to be sealed in turn.

MODIFICATION 10

New Prosorb compartment formed to base of case. Lift-out case base panel conceals the prosorb but allows for ventilation. Front panel to lift out independently to allow the prosorb to be accessed without decanting the entire case. Case volume is: 0.56m x 1.62m x 5.125m = 4.65m3 Allowing 8kg of Prosorb / m3 indicates that 37.2kg of prosorb is required. The cassettes provide 950g, so 40 cassettes are required.

MODIFICATION 11

New LED Case Lighting to case base (design and Spec TBD). Contractor to allow for fitting of free issue lights, to lighting designers' layout and spec. Apertures for lighting to be grommetted / sealed to reduce leakage. Drivers for lights to be located above the case in an accessible and well ventilated location.

MODIFICATION 12

Existing drawers to case bases could be modified so that the drawer fronts become demountable access panels to case base structure. Viability of this to be determined based on investigative work by contractor.

FRONT ELEVATION 1:10 at A1

SKETCH SECTION 1:10 at A1

ADDITIONAL INFORMATION

AIMS OF REFURBISHMENT

Refer to cover page of Briefing Document for further notes regards Aims of Refurbishment and Contractor requirements.

Rev	Date		By	Ch'd By
A	11/08/22	Drawing has been updated to incorporate all comments received from client and architectural design team.	MN	
B	23/08/22	Drawing has been updated to show 18mm ZF MDF; correct spelling of Dacrylate; lift-out front panel of base which allows prosorb to be accessed without decanting the case (or without completely decanting it - some floor-mounted objects may still need to be removed).	MN	
C	16/11/22	Drawing has been reissued as part of wider updates to the brief- for tender. Some annotation has been updated. Marvel seal has been added.	MN	

This drawing is the intellectual property of Studio MB and is subject to copyright. © This drawing and the contents depicted are the copyright of Studio MB Ltd and may not be reproduced or amended except by written permission. The designers disclaim responsibility for variations from this drawing made without their written consent.

All proprietary goods and materials are to be fitted in accordance with manufacturers instructions and relevant Codes of Practice. All work to comply with relevant National Building Regulations. Notwithstanding all of the above, electrical work must comply with current I.E.E regulations (BS 7671) or equivalent. The contractor will be held responsible for the structural integrity of all fittings and fixtures supplied.

No dimensions to be scaled from this drawing. Dimensions must be checked by Contractor. All dimensions to be checked on site and against site conditions. Any variations between stated dimensions and site dimensions should be reported to the designer before work starts.

If in doubt refer to designer before work starts. Samples of all finishes must be provided by the Contractor and approved by the designer before work starts.

Job Number: MB750		Studio MB	
Status: For Tender			
Work Stage: Developed Design		20 Hill St, Edinburgh, UK. EH2 3JZ. T: 0131 555 9355 E: hello@studiomb.co.uk	
Page: 1/1	Page Size: A1		
Project Title: Nature + Love at the Horniman			
Drawing Title: NHG Case Test Brief - Proposed Modification to Cases 48-53			
Drawn by: MN	Checked by:	Date Drawn: 24/06/22	Scale AS NOTED
Drawing No: NHG 83 005 C			Rev: C

Appendix D

Rules for Visiting Contractors and Site Logistics



Museum Rules for Visiting Contractors

This sheet sets out the Museum rules for all visiting contractors, and should be issued to all relevant person for information.

We are required under the Health and Safety at Work etc. Act 1974 to ensure that a safe place of work exists for all those who have cause to use the premises. This duty extends to not only staff and visitors but other users, including contractors.

It is the responsibility of every contractor to ensure that his site supervisor receives a copy of these rules and that his employees are informed of those rules which affect them.

These rules are not negotiable and the Museum requires, as part of the work contract, that they are strictly adhered to.

Any willful ignoring of these rules will result in the person being banned from the Museum site and any further breach may result in the company being barred from any further work for the Museum.

Parking

As there is limited space onsite the Museum cannot guarantee to provide contractor parking and staff attending site should be informed of this and advised that they may need to park offsite. If there is equipment to unload, the Museum should be informed in advance and arrangements can be made for short term parking on site. Vehicles should then be removed from the site unless tools and equipment, that is essential to their operation, are kept and accessed in the vehicle.

Vehicle Access

All means of access must be agreed in advance by the Facilities Manager or Deputy Facilities Manager. The normal vehicle access route is via the Horniman Drive gate. Contractors should be reminded of the rules while driving a vehicle on site which must be observed. Mobile telephones must not be used whilst driving. The speed limit is 5mph with hazard lights on.

Identification badges work permits and keys

Every person must wear the prescribed Museum identification badge/work permit in a prominent position at all times when in the Museum. Museum identification badges/work permits may be removed **temporarily** if it is identified that they will interfere with the safe use of tools or equipment. The badge/permit/key/swipe card will be issued at the security desk on arrival and must be returned on departure. The badges/permits/keys/ swipe cards must not be taken 'off site' and must be handed in whenever leaving the Museum. Failure to comply may result in permission to work on site being refused.

Smoking

No smoking except in the designated location is permitted anywhere in the Museum at any time, including courtyard areas.

Hot Works, Working at Height (at any height where there is a risk of a fall), Electrical Work

All works which have any element as above must be agreed in advance with the Facilities Manager or Deputy Facilities Manager and a Permit to Work obtained from the security desk. This may also require the authorized isolation of the fire alarm system prior to the commencement of any hot 'work'. Any work activity which creates flame, sparks, smoke or dust must take into account the smoke and heat fire detection units. Any deactivation of alarms should be authorized by the Facilities Manager or deputy Facilities Manager and logged in the security log book. Work may not commence until this precaution has been confirmed by Security. Those persons carrying out 'hot works' are required to supply their own fire extinguishers which are appropriate to the risk identified in the risk assessment.

Suitable risk assessments should be completed as required by the Management of Health and Safety at Work Regulations 1999 before the work begins.

Any contractor refusing to complete a work permit will not be permitted to work on site.

Equipment brought on site

All equipment used by a Contractor or Supplier must be in good working order, comply with appropriate safety and electrical legislation, should be PAT tested and visually inspected before use.

Equipment left on site shall be kept in a safe and secure manner ideally in a locked cupboard and at the risk of the Contractor or Supplier.

All portable appliances used outside of buildings and on construction sites should, where possible, be battery operated or be suitable for use with 110 volt power supply with additional consideration given to the positioning of the trailing leads to avoid slip and trip hazards.

Personal protection

Contractors should ensure they wear appropriate personal protective clothing as specified in the risk assessment to include, safety footwear, head protection, ear protection, eye protection, suitable gloves and face protection as required by the activity risk assessment.

Competence

All those persons employed to carry out work at the Horniman Museum must be competent. They must have the required skills, knowledge, ability, training and experience to complete their work safely and effectively.

Construction (Design and Management) Regulations 2015, Contractors and the self-employed

The Horniman Museum has strict controls in place to comply with the Construction (Design and Management) Regulations 2015 (CDM 2015). Work classed as construction within CDM 2015 (e.g. building maintenance and repair, redecoration, high pressure water jetting, installation of electrical or IT cabling), which involves more than one contractor, requires one of the contractors to be appointed in writing as the Principal Contractor and Principal Designer where necessary, by the Museum. All such work, whether or not involving one contractor, will require a written Construction Phase Plan in place prior to work commencing.

Under the CDM 2015 Regulations, the Horniman Museum will be the 'client' in respect of any relevant works undertaken. The 'client' is required to inform the Health and Safety Executive (HSE) about certain construction projects. A project becomes notifiable to the HSE if the construction work is expected to last longer than 30 working days and have more than 20 workers working at the same time at any point on the project or if the work will exceed 500 person days. The client for the construction work is required to send the notification to HSE, either on-line (on form F10) or in writing.

It is a requirement under the CDM 2015 Regulations that the Principal Contractor manages the Construction Phase Plan and ensures contractors and self-employed people working on the site are made aware of their duties accordingly. All contractors must ensure that full induction of his/her own staff, sub-contractors and the self-employed is carried out and that these site rules are documented and signed by all inductees to demonstrate full understanding by all persons working on site.

The Principal Contractor is required to check the competence of any domestic named or nominated contractor for the purposes of complying with the Construction (Design and Management) Regulations 2015.

Food and drink

No food or drink of any type may be taken into, or consumed within the Museum galleries, plant rooms or in areas where work is being undertaken.

Radios

No music devices, radio headphones or MP3 players may be used within the Museum or Gardens at any time.

Language

Foul, offensive or immoderate language is not acceptable within the Museum and Gardens at any time. Any willful ignoring of this rule will result in the person being banned from the Museum site and any further breach may result in the company being barred from any further work for the Museum. In hot weather, shirts must be kept on at all time across the site.

Fire alarms and evacuations

Fire alarms are tested every Thursday morning between 07.00 and 09.00. They will sound for a few seconds only and then stop. This activation is repeated several times.

At all other times when the fire alarm sounds, all contractors must make safe any equipment being used and must evacuate the building immediately by the nearest exit and gather in front of the clock tower.

The contractor must nominate a member of staff to be responsible for checking that all of the staff are clear of the building and report such to the nearest Visitor Services Assistant who will relay the information to Incident Controller. Contractors must not re-enter the building without permission from the Incident Controller.

Accidents and work related illness

All accidents and work related illness should be reported to the Security Desk and the relevant forms filled in.

Contractors should notify the museum of any known disability (e.g. hearing impairment, colour blindness), health condition (including allergies) or language difficulty which could affect their safety and/or the safety of others whilst undertaking work at the museum.

Toilets

Contractors may use only the toilets designated by the Museum.

Materials

The delivery and storage of materials and the routes and times of entry into the Museum must be agreed with the Facilities Manager or Deputy Facilities Manager in advance.

Waste

The Contractor is responsible for removing all unused materials and/or waste and recyclable materials by the completion of the works and at the end of each work period.

Work Site

Contractors should restrict their movements to the designated work site and agreed access routes.

Works

No work shall be carried out without the prior knowledge and agreement of the Facilities Manager or Deputy Facilities Manager.

Telephones

The Museum phone system is not to be used by Contractors except when it is crucial to the completion or continuation of works or in cases of emergency. It should also be noted that the use of mobile phones within the Museum building should not cause nuisance or annoyance to staff or visitors.

Late/Lone Working

Whilst every effort is made to ensure that works are carried out during the normal working day it is recognised that on occasion it may be necessary to undertake work out of hours. Any contractor working outside normal hours will be required to make use of the Museum's lone worker protection system and carry a Museum radio to stay in contact with Museum Security staff whilst onsite. Any failure to comply with this request will be refused permission to work onsite.

Any contractor or delivery person failing to take reasonable Health, Safety, and Operational Instruction from security staff or management will be told to leave the premises, their superiors will be informed and they will be banned from accessing or working on the Horniman sites in future.

Declaration

I declare that I have fully read and understand this document. I agree to comply with the Rules and acquaint all persons employed by the Company (including sub-contracted staff) with these Safety Rules.

Signed:

Date:

Name (Block Capitals) Position (Block Capitals)

Company Name (Block Capitals)

Document Reviewed April 2016

- 1 ORIGINAL BUILDING
- 2 NEW BUILDING
- 3 CUE BUILDING
- 4 CONSERVATORY
- 5 SUNKEN GARDEN
- 6 TOILETS
- 7 CHILLER
- 8 SHEDS
- 9 BOTHY BUILDING
- 10 MICHAEL HORNIMAN BUILDING
- 11 NURSERY COTTAGE GREEN HOUSES
- 12 NURSERY COTTAGE
- 13 BUTTERFLY HOUSE
- 14 ANIMAL ENCLOSURE
- 15 THE PAVILION
- 16 THE DUTCH BARN
- 17 THE BAND STAND

KICK ABOUT AREA

MEADOW FIELD

Delivery Entrance

- All deliveries must be:**
- Agreed at least 24 hours in advance, via email.
 - Vehicle Reg. number provided to Security in advance.
 - Drivers must maintain 5mph and have hazard lights on.
 - Do not drive on the grass.
 - Deliveries must be completed between 7am - 10am or after 5:30pm.
 - Trained banksman must be present for vehicles driving on site.
 - Drivers and banksman must be aware of all hazards whilst in the gardens, especially other vehicles and the public, including children.
 - Act according to instructions provided by Horniman security team.
 - When offloading scaffolding ensure surrounding areas are properly separated (chapter 8 barriers) to protect staff and public, and that walkways are still usable.
 - All fire exits and fire exit routes are to be kept clear at all times

THE POINT

Delivery Drop-off Location. Contractor Parking Bays

Skip can be located in staff yard.

PUTTING GREEN

Temporary parking for scaffold truck, with prior agreement.

WILDLIFE GARDEN

ROSE HILL GATE

LONDON ROAD PEDESTRIAN GATE

LONDON ROAD MAIN ENTRANCE

Delivery Exit

Appendix E

Pricing Schedule

Trial Case Refurbishment Pricing Document

relating to

Horniman Museum

for

Nature & Love Project

17 November 2022

					£
	<p><u>Horniman Nature & Love</u></p> <p><u>Trial Case Refurbishment</u></p> <p><i>The Pricing Schedule was not prepared in accordance with NRM. These are principal quantities & composite items and only a general indication of the works involved (Tenderers to Undertake Own Measure against composite items). Please note that Tenderers should additionally price for all works included and apparent from the tender drawings and specifications enclosed including all requirements for phasing of works to each area irrespective of whether specifically described or not in the relevant section. Should there be any discrepancies between the Pricing Schedule and Specification & Tender Drawings, the Specification & Tender Drawings shall take precedence.</i></p> <p><i>Studio MB Brief - 16th November 2022 - Bay 4 Cases reference drawings NHG 83 007, 001, 002, 005 and 006. NHG 10 002.</i></p>				
A	Full photographic and measured survey of existing support structure (base, wall hanging, head of case).	1	Item		
B	Provision of construction drawings prior to work commencing.	1	Item		
C	Provision of as built drawings on completion	1	Item		
D	Completion of full report at the end of the process, detailing 'lessons learned' from the process. This will form the brief for the contractor who undertakes any future works.	1	Item		
E	Prepare any mock-ups ahead of the works to demonstrate approach as required.	1	Item		
F	Careful dismantling of the cases with any parts taken off site (issue explanatory detailed statement to HE/LPA.)	1	Item		
	Reassembly & installation of cases.				
G	Modification 1 - New case lining to rear of case including decorations	1	Item		
H	Modification 2 - New case lining to sides of case including decorations	1	Item		
J	Modification 3 - New heavy weight hinges on the interior of each door	1	Item		
K	Modification 4 - New inert compression seals for each of the doors to reduce leakage.	1	Item		
L	Modification 5 - Refurbishment of existing historic locks	1	Item		
	Carried Forward				

					£
	<u>Horniman Nature & Love</u>				
	<u>Trial Case Refurbishment</u>				
	Brought Forward				
	Reassembly & installation of cases (ctd)				
A	Modification 6 - Re-seal glazed panels into wooden frames	1	Item		
B	Modification 7 - New hinged capping panel to tops of cases	1	Item		
C	Modification 8 - New LED Case Lighting to soffit (free issue light fittings)	1	Item		
D	Modification 9 - New case lining to soffits including all decorations	1	Item		
E	Modification 10 - New prosorb compartment base to units as detailed	1	Item		
F	Modification 11 - New LED lighting to Case base; free issue light fittings	1	Item		
G	Modification 12 - Works to existing drawers (excluded at present until results of Survey known)				N/A
H	Temporary props/stays to support adjacent cases while trial cases are dismantled (these should be fitted to the existing cases prior to removal.)	1	Item		
J	Provide full method statement for works to client	1	Item		
K	Provide samples for all finishes	1	Item		
L	Provide details for all fixtures and fittings (hinges, locks etc) to the designer for approval prior to procurement	1	Item		
M	Finish any exposed timber at end of works to match existing	1	Item		
	Carried Forward				

				£
<p align="center"><u>Horniman Nature & Love</u></p> <p align="center"><u>Trial Case Refurbishment</u></p> <p align="right">Brought Forward</p>				
A	Asbestos Survey	1	Item	
B	Provide all necessary hoardings during the works to separate from the public.	1	Item	
C	Provide suitable protection to the existing timber parquet flooring during the works.	1	Item	
D	Protection to existing cases in the immediate area of cases 48-53	1	Item	
E	Include all electrical work to fit, install and focus the case lighting (lights, drivers and connectors to be supplied free issue but cabling to the required locations required).	1	Item	
F	Allow for coordination with Horniman, Architectural Design Team, Exhibition Design Team, including all required meetings	1	Item	
G	Clean/remove debris from bottom of cases	1	Item	
<p><u>Allowance for any other works apparent from the specification and drawings; please list as appropriate</u></p>				
<p align="right">Trial Case Refurbishment</p>				<p align="right">0.00</p>

Ref	Description	£	p
	<p><u>Horniman Nature & Love</u></p> <p>GENERAL SUMMARY</p> <p>1 Preliminaries</p> <p>2 Trial Case Refurbishment</p> <p>0.00</p> <p>Add for: Contractor's Overheads and Profit (Note: if this is included within the priced rates, please indicate the percentage addition here)</p> <p>TOTAL CARRIED TO FORM OF TENDER (___ weeks)</p> <p>Signed.....</p> <p>Date</p> <p>Contractor's Name</p> <p>.....</p> <p>Address</p> <p>.....</p> <p>.....</p> <p>.....</p>		

Appendix F

Pre-Construction Information – To be issued at a later date

Appendix G

Standard Selection Questionnaire

Part 1: Potential Supplier Information

Please answer the following questions in full. Note that every organisation that is being relied on to meet the selection must complete and submit the Part 1 and Part 2 self-declaration.

Section 1	Potential supplier information	
Question number	Question	Response
1.1(a)	Full name of the potential supplier submitting the information	
1.1(b) – (i)	Registered office address (if applicable)	
1.1(b) – (ii)	Registered website address (if applicable)	
1.1(c)	Trading status a) public limited company b) limited company c) limited liability partnership d) other partnership e) sole trader f) third sector g) other (please specify your trading status)	
1.1(d)	Date of registration in country of origin	
1.1(e)	Company registration number (if applicable)	
1.1(f)	Charity registration number (if applicable)	
1.1(g)	Head office DUNS number (if applicable)	
1.1(h)	Registered VAT number	
1.1(i) - (i)	If applicable, is your organisation registered with the appropriate professional or trade register(s) in the member state where it is established?	Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>
1.1(i) - (ii)	If you responded yes to 1.1(i) - (i), please provide the relevant details, including the registration number(s).	
1.1(j) - (i)	Is it a legal requirement in the state where you are established for you to possess a particular authorisation, or be a member of a particular organisation in order to provide the services specified in this procurement?	Yes <input type="checkbox"/> No <input type="checkbox"/>
1.1(j) - (ii)	If you responded yes to 1.1(j) - (i), please provide additional details of what is required and confirmation that you have complied with this.	
1.1(k)	Trading name(s) that will be used if successful in this procurement	

Section 1		
Potential supplier information		
Question number	Question	Response
1.1(l)	Relevant classifications (state whether you fall within one of these, and if so which one) a) Voluntary Community Social Enterprise (VCSE) b) Sheltered Workshop c) Public service mutual	
1.1(m)	Are you a Small, Medium or Micro Enterprise (SME) ¹ ?	Yes <input type="checkbox"/> No <input type="checkbox"/>
1.1(n)	Details of Persons of Significant Control (PSC), where appropriate: ² <ul style="list-style-type: none"> - Name; - Date of birth; - Nationality; - Country, state or part of the UK where the PSC usually lives; - Service address; - The date he or she became a PSC in relation to the company (for existing companies the 6 April 2016 should be used); - Which conditions for being a PSC are met; - Over 25% up to (and including) 50%, - More than 50% and less than 75%, - 75% or more. ³ (Please enter N/A if not applicable)	
1.1(o)	Details of immediate parent company: <ul style="list-style-type: none"> - Full name of the immediate parent company - Registered office address (if applicable) - Registration number (if applicable) - Head office DUNS number (if applicable) - Head office VAT number (if applicable) 	

¹ See EU definition of SME https://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition_en

² UK companies and limited liability partnerships (LLPs) will be required to identify and record the people who own or control their company. Companies, SEs and LLPs will need to keep a PSC register, and must file the PSC information with the central public register at Companies House. [See PSC guidance](#).

³ Central Government contracting authorities should use this information to have the PSC information for the preferred supplier checked before award.

Section 1	Potential supplier information	
Question number	Question	Response
	(Please enter N/A if not applicable)	
1.1(p)	<p>Details of ultimate parent company:</p> <ul style="list-style-type: none"> - Full name of the ultimate parent company - Registered office address (if applicable) - Registration number (if applicable) - Head office DUNS number (if applicable) - Head office VAT number (if applicable) <p>(Please enter N/A if not applicable)</p>	

Please note: A criminal record check for relevant convictions may be undertaken for the preferred suppliers and the persons of significant in control of them. Please provide the following information about your approach to this procurement:

Section 1	Bidding model	
Question number	Question	Response
1.2(a) - (i)	Are you bidding as the lead contact for a group of economic operators?	<p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p> <p>If yes, please provide details listed in questions 1.2(a) (ii), (a) (iii) and to 1.2(b) (i), (b) (ii), 1.3, Section 2 and 3.</p> <p>If no, and you are a supporting bidder please provide the name of your group at 1.2(a) (ii) for reference purposes, and complete 1.3, Section 2 and 3.</p>
1.2(a) - (ii)	Name of group of economic operators (if applicable)	
1.2(a) - (iii)	Proposed legal structure if the group of economic operators intends to form a named single legal entity prior to signing a contract, if awarded. If you do not propose to form a single legal entity, please explain the legal structure.	
1.2(b) - (i)	Are you or, if applicable, the group of economic operators proposing to use sub-contractors?	<p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p>

Section 1	Bidding model																																																																	
Question number	Question	Response																																																																
1.2(b) - (ii)	<p>If you responded yes to 1.2(b)-(i) please provide additional details for each sub-contractor in the following table: we may ask them to complete this form as well.</p> <table border="1"> <tbody> <tr> <td>Name</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Registered address</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Trading status</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Company registration number</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Head Office DUNS number (if applicable)</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Registered VAT number</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Type of organisation</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>SME (Yes/No)</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>The role each sub-contractor will take in providing the works and /or supplies e.g. key deliverables</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>The approximate % of contractual obligations assigned to each sub-contractor</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>						Name						Registered address						Trading status						Company registration number						Head Office DUNS number (if applicable)						Registered VAT number						Type of organisation						SME (Yes/No)						The role each sub-contractor will take in providing the works and /or supplies e.g. key deliverables						The approximate % of contractual obligations assigned to each sub-contractor					
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Contact details and declaration

I declare that to the best of my knowledge the answers submitted and information contained in this document are correct and accurate.

I declare that, upon request and without delay I will provide the certificates or documentary evidence referred to in this document.

I understand that the information will be used in the selection process to assess my organisation's suitability to be invited to participate further in this procurement.

I understand that the authority may reject this submission in its entirety if there is a failure to answer all the relevant questions fully, or if false/misleading information or content is provided in any section.

I am aware of the consequences of serious misrepresentation.

Section 1	Contact details and declaration	
Question number	Question	Response
1.3(a)	Contact name	
1.3(b)	Name of organisation	
1.3(c)	Role in organisation	
1.3(d)	Phone number	
1.3(e)	E-mail address	
1.3(f)	Postal address	
1.3(g)	Signature (electronic is acceptable)	
1.3(h)	Date	

Part 2: Exclusion Grounds

Please answer the following questions in full. Note that every organisation that is being relied on to meet the selection must complete and submit the Part 1 and Part 2 self-declaration.

Section 2	Grounds for mandatory exclusion	
Question number	Question	Response
2.1(a)	Regulations 57(1) and (2) The detailed grounds for mandatory exclusion of an organisation are set out on this webpage, which should be referred to before completing these questions. Please indicate if, within the past five years you, your organisation or any other person who has powers of representation, decision or control in the organisation been convicted anywhere in the world of any of the offences within the summary below and listed on the webpage.	
	Participation in a criminal organisation.	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b)
	Corruption.	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b)
	Fraud.	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b)
	Terrorist offences or offences linked to terrorist activities	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b)
	Money laundering or terrorist financing	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b)
	Child labour and other forms of trafficking in human beings	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 2.1(b)
2.1(b)	If you have answered yes to question 2.1(a), please provide further details: date of conviction, specify which of the grounds listed the conviction was for, and the reasons for conviction, identity of who has been convicted.	

Section 2		Grounds for mandatory exclusion	
Question number	Question	Response	
	If the relevant documentation is available electronically, please provide the web address, issuing authority, precise reference of the documents.		
2.2	If you have answered Yes to any of the points above have measures been taken to demonstrate the reliability of the organisation despite the existence of a relevant ground for exclusion? (Self Cleaning)	Yes <input type="checkbox"/> No <input type="checkbox"/>	
2.3(a)	Regulation 57(3) Has it been established, for your organisation by a judicial or administrative decision having final and binding effect in accordance with the legal provisions of any part of the United Kingdom or the legal provisions of the country in which the organisation is established (if outside the UK), that the organisation is in breach of obligations related to the payment of tax or social security contributions?	Yes <input type="checkbox"/> No <input type="checkbox"/>	
2.3(b)	If you have answered yes to question 2.3(a), please provide further details. Please also confirm you have paid, or have entered into a binding arrangement with a view to paying, the outstanding sum including where applicable any accrued interest and/or fines.		

Please Note: The authority reserves the right to use its discretion to exclude a potential supplier where it can demonstrate by any appropriate means that the potential supplier is in breach of its obligations relating to the non-payment of taxes or social security contributions.

Section 3	Grounds for discretionary exclusion	
	Question	Response
3.1	Regulation 57 (8) The detailed grounds for discretionary exclusion of an organisation are set out on this webpage, which should be referred to before completing these questions. Please indicate if, within the past three years, anywhere in the world any of the following situations have applied to you, your organisation or any other person who has powers of representation, decision or control in the organisation.	
3.1(a)	Breach of environmental obligations?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2
3.1 (b)	Breach of social obligations?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2
3.1 (c)	Breach of labour law obligations?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2
3.1(d)	Bankrupt or is the subject of insolvency or winding-up proceedings, where the organisation's assets are being administered by a liquidator or by the court, where it is in an arrangement with creditors, where its business activities are suspended or it is in any analogous situation arising from a similar procedure under the laws and regulations of any State?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2
3.1(e)	Guilty of grave professional misconduct?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2
3.1(f)	Entered into agreements with other economic operators aimed at distorting competition?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2
3.1(g)	Aware of any conflict of interest within the meaning of regulation 24 due to the participation in the procurement procedure?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2
3.1(h)	Been involved in the preparation of the procurement procedure?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2
3.1(i)	Shown significant or persistent deficiencies in the performance of a substantive requirement under a prior public contract, a prior contract with a contracting entity, or a prior concession contract, which led to early	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please provide details at 3.2

Section 3	Grounds for discretionary exclusion	
	Question	Response
	termination of that prior contract, damages or other comparable sanctions?	
3.1(j)	Please answer the following statements	
3.1(j) - (i)	The organisation is guilty of serious misrepresentation in supplying the information required for the verification of the absence of grounds for exclusion or the fulfilment of the selection criteria.	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 3.2
3.1(j) - (ii)	The organisation has withheld such information.	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 3.2
3.1(j) – (iii)	The organisation is not able to submit supporting documents required under regulation 59 of the Public Contracts Regulations 2015.	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 3.2
3.1(j)-(iv)	The organisation has influenced the decision-making process of the contracting authority to obtain confidential information that may confer upon the organisation undue advantages in the procurement procedure, or to negligently provided misleading information that may have a material influence on decisions concerning exclusion, selection or award.	Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes please provide details at 3.2
3.2	If you have answered Yes to any of the above, explain what measures been taken to demonstrate the reliability of the organisation despite the existence of a relevant ground for exclusion? (Self Cleaning)	

Part 3: Selection Questions⁴

Section 4		Economic and Financial Standing
	Question	Response
4.1	Are you able to provide a copy of your audited accounts for the last two years, if requested? If no, can you provide one of the following: answer with Y/N in the relevant box.	Yes <input type="checkbox"/> No <input type="checkbox"/>
	(a) A statement of the turnover, Profit and Loss Account/Income Statement, Balance Sheet/Statement of Financial Position and Statement of Cash Flow for the most recent year of trading for this organisation.	Yes <input type="checkbox"/> No <input type="checkbox"/>
	(b) A statement of the cash flow forecast for the current year and a bank letter outlining the current cash and credit position.	Yes <input type="checkbox"/> No <input type="checkbox"/>
	(c) Alternative means of demonstrating financial status if any of the above are not available (e.g. forecast of turnover for the current year and a statement of funding provided by the owners and/or the bank, charity accruals accounts or an alternative means of demonstrating financial status).	Yes <input type="checkbox"/> No <input type="checkbox"/>
4.2	Where we have specified a minimum level of economic and financial standing and/ or a minimum financial threshold within the evaluation criteria for this procurement, please self-certify by answering 'Yes' or 'No' that you meet the requirements set out.	Yes <input type="checkbox"/> No <input type="checkbox"/>

Section 5		If you have indicated in the Selection Questionnaire question 1.2 that you are part of a wider group, please provide further details below:
Name of organisation		
Relationship to the Supplier completing these questions		
5.1	Are you able to provide parent company accounts if requested to at a later stage?	Yes <input type="checkbox"/> No <input type="checkbox"/>
5.2	If yes, would the parent company be willing to provide a guarantee if necessary?	Yes <input type="checkbox"/> No <input type="checkbox"/>
5.3	If no, would you be able to obtain a guarantee elsewhere (e.g. from a bank)?	Yes <input type="checkbox"/> No <input type="checkbox"/>

⁴ See Action Note 8/16 Updated Standard Selection Questionnaire

Section 6	Technical and Professional Ability
6.1	<p>Please provide details of up to three contracts, in any combination from either the public or private sector; voluntary, charity or social enterprise (VCSE) that are relevant to our requirement. VCSEs may include samples of grant-funded work. Contracts for supplies or services should have been performed during the past three years. Works contracts may be from the past ten years.</p> <p>The named contact provided should be able to provide written evidence to confirm the accuracy of the information provided below.</p> <p>Consortia bids should provide relevant examples of where the consortium has delivered similar requirements. If this is not possible (e.g. the consortium is newly formed or a Special Purpose Vehicle is to be created for this contract) then three separate examples should be provided between the principal member(s) of the proposed consortium or Special Purpose Vehicle (three examples are not required from each member).</p> <p>Where the Supplier is a Special Purpose Vehicle, or a managing agent not intending to be the main provider of the supplies or services, the information requested should be provided in respect of the main intended provider(s) or sub-contractor(s) who will deliver the contract.</p> <p>If you cannot provide examples see question 6.3</p>

	Contract 1	Contract 2	Contract 3
Name of customer organisation			
Point of contact in the organisation			
Position in the organisation			
E-mail address			
Description of contract			
Contract Start date			
Contract completion date			
Estimated contract value			

Section 6	Technical and Professional Ability
6.2	<p>Where you intend to sub-contract a proportion of the contract, please demonstrate how you have previously maintained healthy supply chains with your sub-contractor(s)</p> <p>Evidence should include, but is not limited to, details of your supply chain management tracking systems to ensure performance of the contract and including prompt payment or membership of the UK Prompt Payment Code (or equivalent schemes in other countries)</p>

6.3	If you cannot provide at least one example for questions 6.1, in no more than 500 words please provide an explanation for this e.g. your organisation is a new start-up or you have provided services in the past but not under a contract.

Section 7 Modern Slavery Act 2015: Requirements under Modern Slavery Act 2015		
7.1	Are you a relevant commercial organisation as defined by section 54 ("Transparency in supply chains etc.") of the Modern Slavery Act 2015 ("the Act")?	Yes <input type="checkbox"/> N/A <input type="checkbox"/>
7.2	If you have answered yes to question 7.1 are you compliant with the annual reporting requirements contained within Section 54 of the Act 2015?	Yes <input type="checkbox"/> Please provide the relevant url ... No <input type="checkbox"/> Please provide an explanation

8. Additional Questions

Suppliers who self-certify that they meet the requirements to these additional questions will be required to provide evidence of this if they are successful at contract award stage.

Section 8	Additional Questions
8.1	Insurance
a.	<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: Y/N</p> <p>Employer's (Compulsory) Liability Insurance = £5,000,000 Public Liability Insurance = £10,000,000 Professional Indemnity Insurance = £1,000,000 Product Liability Insurance = N/A</p> <p>*It is a legal requirement that all companies hold Employer's (Compulsory) Liability Insurance of £5 million as a minimum. Please note this requirement is not applicable to Sole Traders.</p>
8.2	Sustainability
a.	<p>Please provide a copy of your Sustainability Policy or similar</p> <p>Pass/ Fail</p>
8.3	Health and Safety
a.	<p>Please provide a copy of your Health and Safety Policy</p> <p>Pass/ Fail</p>