

Townscape Heritage: Stage II

Building Condition Surveys & Valuations

Padiham: Crafting the Future

Tender Brief

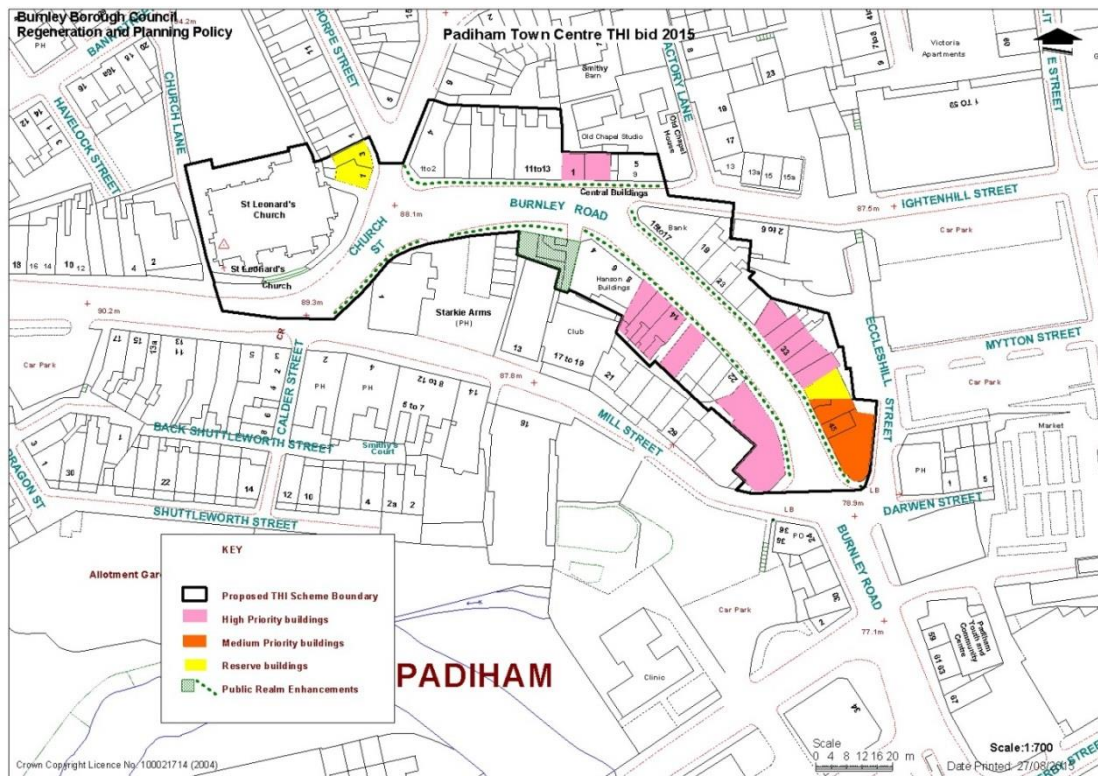
Date of issue: 12th September 2016

1. Purpose

- 1.1. Burnley Council requires the support of a range of professional services to develop the 'Padiham – Crafting the Future' project and prepare a Stage II Heritage Lottery Fund (HLF) Townscape Heritage (TH) application. The Council wish to appoint a suitably experienced and qualified (RICS / RIBA / IHBC accredited) consultant or consortium to work with the Council's project team in developing the detailed plans for capital works and development of the stage II bid.
- 1.2. The appointed consultant, in consultation with property owners within the boundary of the TH area, is required to undertake detailed building surveys of target historic buildings in order to develop a schedule of eligible works in terms of repairs, restoration and/or re-instatement of original features for each building alongside a breakdown of estimated costs for the works. In addition valuations / development appraisals are required for a number of buildings to calculate the grants towards the 'conservation deficit' of a project to bring vacant floorspace back into use.
- 1.3. The findings of the building condition surveys and development appraisals / valuations will enable the Council to develop the required Detailed Scheme Plan proposals for inclusion in the Stage II Padiham TH application to the HLF. It will further enable the Council to refine the prioritisation of the target TH properties and inform the final proposals for the TH grant programme.

2. Background

- 2.1. Burnley Council received first round support for the Padiham TH scheme 'Padiham: Crafting the Future' from the HLF in February this year, with 'Permission to Start' the development phase and preparation of the stage II bid given in May. The Council has until 28th February 2017 to progress plans and submit the second round application for the full grant.
- 2.2. The full grant involves a five year programme to breathe new life back into the heart of Padiham through five separate programmes:
- Physical works to buildings – grants to property owners to cover a fixed percentage of the costs of repair to the exterior; reinstatement and restoration of historic features; and/or, bringing vacant floorspace back into use. Physical works must be carried out to a high standard using traditional materials and workmanship.
 - Public Realm Scheme - £250,000 public realm scheme to include decluttering of street furniture and signage; new pavement treatments; pavement widening; public art; replacing lamp posts; and introducing a 20 mph zone
 - Education and Engagement Programme – Working with local partners including the Gawthorpe Textile Collection and the Padiham Archive to deliver a programme of engagement with Heritage
 - Heritage / Conservation Skills Programme – delivering a series of training days targeting local contractors, crafts people and apprentices
 - Project management and evaluation – managed by a dedicated TH Officer.
- 2.3. The Padiham TH area focusses on a compact area of mostly Victorian buildings along a 0.2km stretch of Burnley Road (the A671), predominantly in retail use, lining a steep west facing slope referred to locally as “the Hill”. Saint Leonards Church forms the centre-piece at the apex. This tight grained area of historic townscape lies on a gateway into the town and comprises 40 properties. It represents a significant cluster of buildings of positive architectural merit, including 4 Listed Buildings and 29 Locally Listed buildings. A plan of the area is shown below and included in Appendix A and a full list of the target properties is included in Appendix B: Padiham TH -Priority Blocks and Priority Buildings.



- 2.4. The four priority blocks that have been targeted for TH improvements form an intimate townscape with a high degree of heritage interest and are considered to have the potential for greatest regenerative and heritage benefits. The blocks have been chosen to represent a 'cluster' of historic buildings, commercial stock of townscape prominence, in which real change can be achieved to greatest effect. These blocks contain the highest concentration of vacant and neglected buildings within the TH area and significant loss of heritage details with poor quality or inappropriate replacements, particularly shop fronts and signage. The majority of these buildings are in a poor state of maintenance and some require comprehensive repairs and architectural replacements. In particular, there is a concentration of individual buildings within Block One (15-45 Burnley Road) that require comprehensive works and repairs due to a prolonged period of dis-use and inadequate maintenance. Some buildings will require radical interventions to bring floor space back into use.
- 2.5. This rationalised TH area was chosen following a radical prioritisation process. The Council (with Conservation Surveyors Jubb & Jubb) initially looked at a much wider area of seven separate blocks incorporating Church Street and Gawthorpe Street. However, given the funding available it was felt that the impact would be dissipated over such a large area and did not effectively address the main issues identified by Historic England.
- 2.6. Key to the overall regeneration of the area in terms of increased vibrancy and vitality is the uptake of more residential and commercial space to increase footfall and spend. Increases in occupancy of upper floors will also ensure that the buildings are better looked after and maintained as they will not be neglected and left to go into disrepair. A number of the priority buildings have been vacant for a prolonged period of time and require complete refurbishment to bring them back into use. The most notable of these are 33 and 35 Burnley Road and The

Former National School Buildings. Such schemes will be subject to valuations and a development appraisal to determine the “conservation deficit” which would determine the level of grant.

- 2.7. During the stage II development phase the Council and their appointed consultant team, will refine and finalise the detailed scheme of physical works and costs to be carried out to priority properties. In addition, an exemplar scheme to deliver a completely refurbished priority building (possibly 33 or 35 Burnley Road), with residential upper floors and renovated ground floor retail unit will be scoped out. It is envisaged that the exemplar building will be delivered early in the 5-year TH programme to set an example of good craftsmanship and to deliver immediate impact on a very predominant block

3. Stage II application - Scope of services required by the Council

- 3.1. During the development of the Stage I application to HLF, the Council appointed specialist Conservation Surveyors Jubb and Jubb to carry out external surveys on properties within the wider TH area. The external surveys were carried out in August 2014 on seven blocks (c.58 properties) identified in the initial proposed Padiham TH boundary. The report provided preliminary and outline cost estimates of the likely costs of TH eligible works, as well as developing and applying a scoring matrix to identify priority buildings. A review of this work is now required to develop detailed plans for capital works and development of the Stage II bid submission.

- 3.2. The successful consultant, through consultation with property owners and support from the Council’s project team¹, is expected to undertake the following areas of work:

- **Building Condition Surveys** are to be reviewed for all 33 properties listed in Appendix B, to produce an up-to-date picture of the condition of the buildings in the rationalised TH area. Working in consultation with property owners within the boundary of the TH area, each building is to be inspected externally (and internally where considered necessary and where possible) to enable a prioritised, and fully itemised, schedule of eligible works (categorised as either repair or restoration) alongside estimated scheme costs to be identified.

An outline description and photograph is to be provided for each eligible property. Successful consultants should review the information within the Jubb & Jubb (2014) report and update the information where necessary to provide a detailed evaluation of each property’s condition (recording scale of disrepair / damage), alongside recommendations for appropriate strategies for dealing with any items of repair. Any original features to be restored or reinstated should also be identified. The evaluation should include, but not be limited to the following areas:

- Documenting a brief history of the building including all recent alterations or additions

¹ The division of roles and responsibilities between the Council’s project team and the successful consultant are to be discussed and agreed at the inception meeting.

- Documenting the general present condition of the property, highlighting any areas of failure or concern
- Identifying causes of past, or ongoing, deterioration
- Identifying issues that need further enquires to pre-empt problems in the future
- Presenting conservation and maintenance recommendations, including works to enable re-use of vacant floorspace and cosmetic repairs.
- Outlining the extent and any limitations of the surveys conducted

A spreadsheet detailing the schedule of eligible works is to be provided and should identify each individual item of work, coded both in terms of existing condition grading and priority grading. Budget costs for each item are to be provided as well as total costs (including on-costs) for the full programme of eligible items provided for each building. Works should be classified as either repair and/or restoration. The scope of building repair and restoration works are to be to a high conservation standard using traditional materials and methods to carry out the works.

Some areas of concern which consultants may need to consider addressing through the building condition surveys include:

- Inappropriate replacement shop frontages and signage (particularly oversized fascia's and inappropriate use of security measures such as box shutters)
 - Loss of heritage details and materials including low quality repairs
 - Use of inappropriate (or lack of) roof materials (including roof coverings, leadwork and rain water goods)
 - Replacement of front doors with inappropriate designs and finishes
 - Replacement of wooden sash windows with aluminium or UPVC frames
 - Removal of heritage mouldings, external architectural detail/decoration and other details
 - Removal of chimney stacks and pots
 - Addition of aërials and satellite dishes
 - Extensions of inappropriate design, scale and materials
- **Review scope of Jubb & Jubb report.** Consultants should review in full the notes provided by Jubb & Jubb regarding the methodology and assumptions undertaken at the time of the original report, taking into account the identified limitations of the Stage I bid report. These are to be investigated and addressed further within the Stage II report through further consultation with property owners (in conjunction with the Council's project team).

In summary, below are the areas that require further investigation:

- Measurement of the buildings to be undertaken at Stage II
- Testing the assumptions regarding the Preliminaries included at Stage I on a sliding scale (12% - 15%).
- Scaffold and access costs were included at Stage I, but rates did not include for highways closures and licenses – this is to be considered further at stage II

- Testing the assumptions regarding the Fees included at Stage I on a sliding scale based on the size of the scheme (15% - 19%).
 - Contingency rates were included for the schemes to reflect the known issues / risks of each (10% - 20%). At Stage II, further risk and sensitivity testing may allow the contingencies to be allocated to specific risks.
 - Reviewing the inflation rates included within the Stage 1 costings
 - Further detailed consultation and consideration is to be given to block repair works etc. at stage II as this would affect the net to gross individual project overheads, such as fee rates and scaffold / access costs.
 - Further detailed consultation to ascertain the owner's level of affordability to contribute to a repair and/or restoration scheme.
 - Testing assumptions of grant rate intervention – grant rates will vary and will depend on a number of factors, such as the costs of the works, the value of the properties and the likely impact the value of the works will have on them, as well as owners' affordability etc. This is to be explored further during the Stage II development phase.
 - VAT was applied at the prevailing rate of 20% at Stage I. However, it is thought that some lower rates may be available for conversion works, and some businesses may be able to recover VAT, but the general assumption is that any non-recoverable VAT is an eligible item. This is to be explored through further detailed consultation and consideration to correctly identify the amount of eligible VAT to include in the schemes.
- **Development Appraisals / Valuations.** Vacant floor space grants aimed at increasing occupancy levels of whole buildings including bringing back into use areas above shops etc. will be eligible under the TH grant scheme. A development appraisal will form the financial basis for calculating grants towards the 'conservation deficit' of such a project and should be worked out on the basis of a 'residual valuation'. The Council therefore requires a Development Appraisal together with Valuations of the current value of the property and estimated value of the property upon completion of the works for the three properties listed below. The conservation deficit should be clearly shown for each building, alongside the applicable grant rate / percentage and schedule of eligible works. Eligible development costs for these buildings are to include all aspects of the physical works of conversion, including necessary internal and external alterations, provision of basic services and basic decoration.
 - 33 Burnley Road
 - 35 Burnley Road
 - The Former National School Buildings
 - **Rectified photography / architects drawings of the completed schemes** Basic drawings of a sample of the proposed completed heritage frontages are to be provided (and should be made available separately in a digital format).
 - **Building Priority Rating List.** In conjunction with the Council's project team, the current priority ratings applied across the TH area are to be refined (based on the results of the

surveys and consultation with property owners), and should group buildings into the following categories:

- **High Priority Projects** – essential to the delivery of a scheme, making a fundamental difference to the overall townscape.
- **Medium Priority Projects** – clearly contributing to the enhancement of the conservation area.
- **Reserve Projects** – worthwhile pursuing should funding become available or if some of the priority projects fail to come forward for a grant.
- **TH Area Map.** The development of a new project priority map should incorporate the updated priority ratings applied to the buildings within the TH boundary area.

4. Consultation and Stage II Submission Documents

4.1. In summary, the council's project team require support from the successful consultant to:

- Consult property owners and businesses within the boundary of the TH area
- Prepare materials for public consultation and events, including attendance when necessary
- Prepare Stage II submission documents as required by HLF including (but not limited to):

Stage II Documents	Requirement from Consultant:
- Detailed scheme plan for work to deliver high, medium and reserve projects	- Support the Council's project team to evaluate the property survey results and feedback from consultation with owners to recommend a revised priority list based
- Copies of surveys	- Produce information and prepare necessary documents
- Copies of valuations	- Produce information and prepare necessary documents
- Photographs of eligible properties	- Produce photographs and prepare necessary documents
- A map or maps that precisely define the location of the eligible properties	- Support the Council's project team to produce and prepare the necessary documents
- Spreadsheet detailing cost breakdown	- Produce information and prepare necessary documents
- A scheme timetable / programme	- Recommend timetable / programme to be agreed by Council's project team
- Letters of support – received from property owners in support of the detailed scheme plan	- Produce information and prepare necessary documents

- 4.2. Regular communications, updates and meetings are expected to take place between the successful consultant and the Council's project team throughout the work period. The successful Consultant will also be required to attend consultation events / workshops with Council Officers and Property Owners and may also be required to attend project meetings from time to time.
- 4.3. Electronic documents should be provided as Microsoft Word or Excel (or other suitable) format which will allow the Council to extract information for future pieces of work. Photographs, diagrams, graphical information or plans developed as part of the work should also be made available separately in an appropriate digital format).

5. Access arrangements

- 5.1. Access to properties for internal / external inspections will be arranged by Burnley Council's Townscape Heritage Development Officer in discussion with the successful consultant.
- 5.2. It is for the Consultant to determine whether any special access requirements are necessary to undertake roof inspections etc. The costs of such access should be included within the fee proposal.

6. Timetable

- 6.1. The Council are working to extremely tight and non-negotiable timescales as set by the HLF for the submission of a stage II bid by 28th February 2017. Therefore it is vital to the success of the overall project that the work is finished according to the following key indicative milestones for the project.

Item	Dates
Issue Tender Brief and ITT documents	12 th September
Form of Acknowledgement returned	20 th September
ITT clarification questions cut-off date	20 th September
Deadline for return of completed ITT	26 th September
Notification issued to Consultants invited to attend clarification interviews (if required) ²	29 th September
Clarification interviews (if required) ¹	4 th October
Evaluation of tenders	5 th October
Notification of result and appointment of successful firm	6 th October
Inception Meeting	10 th October
Surveys / valuations completed & information presented	14 th November
Rectified photography / architects drawings completed	14 th November
Surveys / valuations reviewed and detailed schemes / costs developed (in consultation with owners)	12 th December
Refine listing and prioritisation of target properties	12 th December

Table 1: Timetable. NB: Dates set out in the table above are indicative only and may be subject to change.

7. Project Team

7.1. The Consultants will work closely with the Council's professional project team, including:

- Sarah Heslop, Development Officer
- Suzanne Pickering, Townscape Heritage Development Officer
- Erika Eden-Porter, Conservation Officer
- Catherine Price, Town Centre Manager
- John Killion, Project Officer (Vacant Housing)
- Kath Hudson, Business Support Manager

8. Budget & Payment schedule

8.1. Budgetary resources are limited and the Council is seeking good quality advice from appropriately experienced professionals at competitive rates. This work has a budget of £22,000 - £26,000 (maximum)

8.2. Consultant invoices will be paid on completion of the work.

² Once tenders and supporting information is submitted, the Council may wish to hold meetings, site visits and / or interviews with any or all of the Tenderers as it considers appropriate to clarify any aspect of the Tender.

9. Tender Response

- 9.1. Consultants will need to demonstrate a proven track record in delivering high quality outputs on time, to budget and in accordance with client expectations. The Council requires the following elements, as a minimum, to comprise the tender response. Please present all information in a clear and concise manner:

Insurance information

- Self certification as to whether you already have or can commit to obtain the levels of insurance cover indicated below (please provide copies of certificates where possible):
 - Public Liability Insurance - £5m
 - Professional Indemnity Insurance - £5m.

Conflict of Interest Statement

- Clear statement showing that your practice does not have any conflicts of interest.

Accreditations

- Clear statement showing that your practice has appropriate RICS / RIBA / IHBC or other appropriate accreditation.

Method Statements

- An interpretation of the brief.
- A description of the methodology proposed to complete the work.
- The name, qualifications, relevant experience and contact details of the individual(s) who will primarily undertake this work.
- A clear timetable and work programme with confirmation of the ability to work to the milestones included in the brief. This should include the total number of days to be spent on the project, by each individual. The timetable should include a schedule of meetings for consultation and progress reviews throughout the process.
- Examples of previous relevant work completed within the last 5 years (up to 3 examples). Examples should include HLF Townscape Heritage projects and / or projects which demonstrate experience / expertise in delivering a range of specialist services of a similar nature.

Fee Schedule

- A fully inclusive fee breakdown. A total all-inclusive fee for the work should be provided along with a breakdown of the costs for undertaking various elements of the work. Day rates for each individual identified to complete the works as described should also be supplied. All rates to be exclusive of VAT.

References

- The names and contact details of two referees (preferably related to the examples provided). References will only be taken up for the preferred Tenderer.

9.2. In addition, the Council requires the following documents to be submitted (please refer to the ITT document):

- Form of Tender.
- Certificate of Non-Collusion and Non-Cavassing.
- Certificate that the Tender is Bona Fida.

10. Evaluation Criteria

10.1. Tenders will be evaluated against quality (60%) and price (40%) criteria to establish the most economically advantageous tender. Please refer to Part 5, 6 & 7 of the ITT document for full details concerning the tender evaluation.

10.2. Quality is worth 60% of the overall evaluation score and will be evaluated through an analysis of the Consultants responses to the Method Statements outlined in section 10 above. Scores will be attributed to these responses by the stakeholder evaluation panel based on the methodology given in the table below.

Score	Criteria
4	Excellent: Above Expectations. Response clearly meets all requirements and demonstrates evidence of some added value.
3	Good: Meets Expectations. Response clearly meets all requirements.
2	Weak: Below Expectations. Response meets all requirements but is lacking or inconsistent in a few identifiable areas.
1	Poor: Well Below Expectations. Response has a number of deficiencies or concerns in certain areas where the lack of detail requires the evaluator to make assumptions.
0	Unacceptable. Response is unacceptable or non-existent. There is a failure to properly address any issues or meet any of the requirements

Table 2: Scoring criteria for method statements

10.3. Price is worth 40% of the overall evaluation score and will be assessed through your response to the Fee Schedule requested in section 10 above.

10.4. The Quality and Price Formulas outlined below will be applied to determine the weighted scores for all criteria, with weighted percentages for each criteria shown in table 3.

10.5. The tender with the highest overall score will be determined as the most economically advantageous tender and will be awarded the contract. This evaluation approach will be applied to the tender response, assessments made from interviews with the Tenderers and to any relevant visits of the Tenderer's Premises as is appropriate.

QUALITY %

$$\left[\frac{\text{Tender Score}}{\text{Max Score}} \times 100 \right] \times \text{Weighted percentage} / 100 = \text{Weighted Score}$$

PRICE %

$$1 - \left[\frac{\text{Tender Price} - \text{Lowest price}}{\text{Tender Price}} \right] \times \text{Weighted percentage} = \text{Weighted Score}$$

Criteria	Sub-criteria	Demonstrated by	Weighting
Adequate insurance cover		Self certification as to whether you already have or can commit to obtain the required insurance	Pass / Fail
No conflict of interest declared		Self certification as to whether your practice has any conflicts of interest	Pass / Fail
RICS /RIBA / IHBC or equivalent accreditation		Self certification as to whether your practice has appropriate accreditation	Pass / Fail
Quality	Interpretation of the brief	Understanding of HLF TH process; requirements of a Stage II submission; the background to the brief; the Padiham TH target area; heritage buildings; and the requirements for the work	10
	Methodology proposed	A clear overall approach to the work and an appropriate methodology outlined for completing each section of the brief.	15
	Identified team / staff	Suitably qualified staff identified with relevant experience of undertaking this type of work	15
	Timetable and work programme	Ability to work to the milestones outlined in the brief, with a realistic number of days allocated to the project	10
	Past experience	Relevant experience of undertaking this type of work	10
Price	Fees and rates	A fully inclusive fee breakdown	40
References³			Pass / Fail
Total Score Available			100

Table 3: Evaluation criteria and weighting

³ References will only be taken up for the preferred Tenderer. References will be subject to a Pass/Fail assessment and in the case of inadequate references being supplied, the Council will take up references for the next highest scoring Tenderer.

11. Instructions for Tendering

- 11.1. In the first instance, please acknowledge receipt of the Tender Brief and Invitation to Tender (ITT) documents and confirm that you intend to submit a tender by **15:00 hours on Tuesday 20th September 2016**, using the 'Form of Acknowledgement' included at Appendix 1 in the ITT document.
- 11.2. Please note that this Tender Brief is a summary version of the process by which the tender should be completed and submitted; please refer to the ITT document for comprehensive instructions.
- 11.3. Please return FOUR printed copies of all necessary documents and information that is requested. An electronic copy of the full document set must also be provided in MS Word file or PDF file format on a CD ROM. The last date and time by which the Tender submission should be returned to the Council is:

15:00 hours on Monday 26th September 2016

- 11.4. Tender documentation must be sealed, addressed and returned to:

Padiham TH: Stage II – ITT Response

The Head of Governance, Law, Property and Regulation
Burnley Borough Council
Town Hall
Burnley
BB11 9SA

12. Further information

- 12.1. Any questions concerning any aspect of this Tender Brief, ITT Document or the tender process should be directed in writing to Sarah Heslop, Development Officer, sheslop@burnley.gov.uk.

Appendix A: Padiham TH Boundary



Appendix B: Padiham TH – Priority Blocks and Priority Buildings

Block 1	Address	Priority
	Former Bank	Medium
	45 Burnley Road	Medium
	43-41 Burnley Road	Medium
	39 Burnley Road	Reserve
	37 Burnley Road	High
	35 Burnley Road	High
	33 Burnley Road	High
	31 Burnley Road	High
	29 Burnley Road	High
	27 Burnley Road	
	25 Burnley Road	
	23 Burnley Road	
	21 Burnley Road	
	19 Burnley Road	
	15 - 17, Burnley Road	
Block 2	Address	Priority
	22 Burnley Road	
	20 Burnley Road	
	18 Burnley Road	
	16 Burnley Road	High
	14 Burnley Road	High
	12 Burnley Road	High
	10 Burnley Road	High
	Former National School Buildings	High
Block 3	Address	Priority
	1 - 3 Burnley Road	
	5 Burnley Road	
	7 Burnley Road	
	9 Burnley Road	
	11 - 13 Burnley Road	
	1 Central Buildings	High
	3 Central Buildings	High
	5-7 Central Buildings	
Block 4	Address	Priority
	1 Moor Lane	Reserve
	3 Moor Lane	Reserve