**Tender Submission**

**Please do not return this in any other format than Word (e.g. PDF, Notes etc.). We will only accept this format.**

**Please save and name your return in Word under you company name for identification purposes when you return the tender.**

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| **"Bidders details"** - Please enter all contact and bank details. | | | | | | | | |
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| **"Candidate 1 Screening Criteria"** - This is where you can give us information about your broad qualifications and experience with word limits for some sections. You should also provide general information and your daily rate here. We will disregard any text beyond this, so please use the space to demonstrate your experience most relevant to our needs. Do not submit any organisational brochure or leaflet as this will also be disregarded. Your organisation may submit up to five named individuals, so just copy and paste the tables for additional candidates. | | | | | | | | |
| **"Candidate 1 Detailed Criteria"** - This is where you can give us detailed information about your experience with word limits for each section. We will disregard any text beyond this, so please use the space to demonstrate your experience most relevant to our needs. Do not submit any organisational brochure or leaflet as this will also be disregarded. Your organisation may submit up to five named individuals, just copy and paste for additional candidates. | | | | | | | | |
| **"Declaration of information"** - This is your declaration that the information you have provided is accurate and true. Please sign this using an electronic signature. | | | | | | | | |
|  | | | | | | | | |
| **"Form of tender"** - This is your declaration for the Contract and your acceptance of the framework agreement. You should type or copy and paste the text from this worksheet onto your own letter headed paper. We will NOT accept any Bidder Qualifications. Please sign this with an electronic signature and return it with your tender submission via the Delta tender-box. | | | | | | | | |
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| **Company details:** | | | | | | | | | |  |
| 1. Registered company name: | | | |  |  |  |  |  | |  |
| 2. Main operational address for the service | | | Address 1: |  |  |  |  |  | |  |
| Address 2: |  |  |  |  |  | |  |
| Address 3: |  |  |  |  |  | |  |
| Town: |  |  |  |  |  | |  |
| County: |  |  |  |  |  | |  |
| Post code: |  |  |  |  |  | |  |
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| **Contacts:** | | | | | | | | | |  |
| 3. Responsible person for the Contract: | | | |  |  |  |  |  | |  |
| Name: | | | |  |  |  |  |  | |  |
| Landline / Mobile: | | | |  |  |  |  |  | |  |
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| 4a. First candidate carrying out the Service (If different from 3. above) | | | | | | | | | | |
| Name: | | | | 0 |  |  |  |  | |  |
| Address 1: | | | | 0 |  |  |  |  | |  |
| Address 2: | | | | 0 |  |  |  |  | |  |
| Address 3: | | | | 0 |  |  |  |  | |  |
| Town: | | | | 0 |  |  |  |  | |  |
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| Post code: | | | | 0 |  |  |  |  | |  |
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| 4b. Second candidate carrying out the Service | | | | | | | | | | |
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| Address 1: | | | |  |  |  |  |  | |  |
| Address 2: | | | |  |  |  |  |  | |  |
| Address 3: | | | |  |  |  |  |  | |  |
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| 4c. Third candidate carrying out the Service | | | | | | | | | | |
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| 4d. Fourth candidate carrying out the Service | | | | | | | | | | |
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| Address 3: | | | |  |  |  |  |  | |  |
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| 4e. Fifth candidate carrying out the Service | | | | | | | | | | |
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| Address 3: | | | |  |  |  |  |  | |  |
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| **Financial information:** | | | | | | | | | | |
| 5. VAT registration number (if applicable) | | | |  |  |  |  |  | |  |
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| 6. Payment Details | | Account name: | |  |  |  |  |  | |  |
| Bank name: | |  |  |  |  |  | |  |
| Address: | |  |  |  |  |  | |  |
| Sort code: | |  |  |  |  |  | |  |
| Account number: | |  |  |  |  |  | |  |
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| **SPECIALIST SKILLS QUESTIONS Construction Project Management Services** | | | | | | | | | | |
| **Candidate 1:** | | **0** | | | | | | | | |
| **1) In this section, we are looking for your relevant underpinning knowledge. Please tick if you have any of the following qualifications (or their international equivalents) relating to Construction Project Management Services.  NB If you do not hold one of these qualifications we are unable to consider you any further.** | | | | | | | | | | |
|  |  |  |  |  |  |  |  |  | |  | |
| Degree or equivalent in building surveying or structural/civil engineering: | | | No | Date of award: |  | Awarding body & award title: |  | | | |
| Degree or equivalent in quantity surveying: | | | No | Date of award: |  | Awarding body & award title: |  | | | |
| Degree or equivalent in architecture (incl. architectural technicians): | | | No | Date of award: |  | Awarding body & award title: |  | | | |
| Degree or equivalent in Construction Project Management: | | | No | Date of award: |  | Awarding body & award title: |  | | | |
| Degree or equivalent in Landscape Architecture: | | | No | Date of award: |  | Awarding body & award title: |  | | | |
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| **2) In this section, we are looking for whether you have attained and maintained the appropriate professional status (where possible this should be through chartered or equivalent membership of an appropriate professional body acquired through an approved programme of professional development and/or professional review/exam). Please confirm by ticking if you are a Chartered Member of the following professional bodies (or their international equivalents).  NB If you are not a Chartered Member of one of these professional bodies (or their international equivalents) we are unable to consider you any further.** | | | | | | | | | | |
|  |  |  |  |  |  |  |  |  | |  | |
| Royal Institute of Chartered Surveyors or equivalent: | | | No | Date member-ship last renewed: |  | Status of your member-ship |  | | | |
| Royal Institute of British Architects: | | | No | Date member-ship last renewed: |  | Status of your member-ship |  | | | |
| Royal Society of Architects in Wales: | | | No | Date member-ship last renewed: |  | Status of your member-ship |  | | | |
| Royal Society of Ulster Architects: | | | No | Date member-ship last renewed: |  | Status of your member-ship |  | | | |
| Royal Incorporation of Architects in Scotland: | | | No | Date member-ship last renewed: |  | Status of your member-ship |  | | | |
| Association for Project Management or equivalent: | | | No | Date member-ship last renewed: |  | Status of your member-ship |  | | | |
| Institute of Historic Building Conservation: | | | No | Date member-ship last renewed: |  | Status of your member-ship |  | | | |
| Landscape Institute: | | | No | Date member-ship last renewed: |  | Status of your member-ship |  | | | |
| Chartered Association of Building Engineers: | | | No | Date member-ship last renewed: |  | Status of your member-ship |  | | | |
| Chartered Institute of Architectural Technicians: | | | No | Date member-ship last renewed: |  | Status of your member-ship |  | | | |
| Chartered Institute of Building | | | No | Date member-ship last renewed: |  | Status of your member-ship |  | | | |
| International equivalent of the above (please give title): | | |  | Date member-ship last renewed: |  | Status of your member-ship |  | | | |
| International equivalent of the above (please give title): | | |  | Date member-ship last renewed: |  | Status of your member-ship |  | | | |
| International equivalent of the above (please give title): | | |  | Date member-ship last renewed: |  | Status of your member-ship |  | | | |
| International equivalent of the above (please give title): | | |  | Date member-ship last renewed: |  | Status of your member-ship |  | | | |
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| **In this section, (comprising questions 3, 4, 5 and 6), we are looking for an appropriate level of experience.** | | | | | | | | | | |
| **3) Please indicate which of the following categories of clients you have been employed by to deliver a construction project (your examples can include heritage and non heritage projects). Provide the names of up to three clients per category, and the value of the capital project. NB You will need experience of at least three of these different client types:** | | | | | | | | | | |
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| **Client Type** | | | | **Client(s)** | | | | | | **Value** | |
| Local government: | | | |  | | | | | |  | |
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| Other Public (e.g. universities, nationally funded museums etc.) or public sector bodies (e.g. NHS, national government, former Sector Skills Council, CADW, Historic Environment Scotland, Historic England, DoE NI, etc.): | | | |  | | | | | |  | |
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| Voluntary and charitable sector: | | | |  | | | | | |  | |
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| Private sector: | | | |  | | | | | |  | |
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| **GENERAL AND COST QUESTIONS** | | | | | | | | | |  | |
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| **1) Please provide three referees who will testify to your achievement of high levels of clientsatisfaction.** | | | | | | | | | | |
|  | **1st referee** | | | **2nd referee** | | | **3rd referee** | | | |
| **Contact name:** |  |  |  |  |  |  |  |  | |  | |
| **Position:** |  |  |  |  |  |  |  |  | |  | |
| **Organisation:** |  |  |  |  |  |  |  |  | |  | |
| **Project title:** |  |  |  |  |  |  |  |  | |  | |
| **Project cost:** |  |  |  |  |  |  |  |  | |  | |
| **email:** |  |  |  |  |  |  |  |  | |  | |
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| **2) What measures do you have in place to monitor your own performance? (100 words)** | | | | | | | | | | |
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| **3) What is your likely capacity (for example days per quarter) and normal lead in time? (100 words)** | | | | | | | | | | |
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| **4) Please demonstrate how you will undertake commissions from all areas of Wales. Please let us know of any potential issues or restrictions you may have in working across Wales (100 words).** | | | | | | | | | | |
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| **5) Cost** | | | | | | | | | |  | |
| Quote the Charges (per day) in pounds sterling and: | | | | | | | | | | |
|          inclusive of VAT, where levied. Please provide your VAT status. State “Not levied” if that is the case. | | | | | | | | | | |
|          inclusive of all photocopying, mailing, printing and other administrative costs; | | | | | | | | | | |
|          exclusive of travel and subsistence. | | | | | | | | | | |
| The charge you quote will apply to the first 40 working days commissioned. The charge will be reduced by 20% for the next 41-80 days commissioned. Work commissioned for 81 and more days will be charged at a further 20% reduction. | | | | | | | | | | |
| HLF will pay reasonable travel expenses only as given below. All other travel must be booked through HLFs travel agency contract. Further details will be provided if your application if successful. | | | | | | | | | | |
| MILEAGE ALLOWANCE RATES Cars (own cars in use): Standard rate up to 10,000 miles pa 45p per mile Standard rate over 10,000 miles pa4 24p per mile  Passenger rate (no mileage limits)¹ 5p per mile  Motorbikes: Standard rate (no mileage cap) 24p per mile  Bicycles: Standard rate (no mileage limits) 20p per mile | | | | | | | | | | |
|  |  |  |  |  |  |  |  |  | |  | |
| Grade | VAT status | Initial daily rate (excl. VAT) | VAT | Initial total for first 40 days | Total for 41-80 days incl. @ 20% discount | Total for 81 days and above @ further 20% discount |  |  | |  | |
|  |  |  | £0.00 | £0.00 | £0.00 | £0.00 |  |  | |  | |
|  |  |  |  |  |  |  |  |  | |  | |
| **6) We must communicate with grantees both verbally and in writing in the Welsh language if the grantee so requires. Please indicate that you are fluent speaker and writer in Welsh?** | | | | | | | | | |  | |
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| **EVALUATION CRITERIA**  **For Information only (Not to be Completed)** | | | | | | | | | |  | |
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| **Criteria** | | | | | | | **Score** | | **Weighting** | **Total** | |
| **Screening criteria - specialist skills - Pass/Fail only** | | | | | | | | | | |
| 1) Qualifications | | | | | | | Pass/Fail | N/A | | Pass/Fail | |
| 2) Professional bodies | | | | | | | Pass/Fail | N/A | | Pass/Fail | |
| 3) Clients | | | | | | | Pass/Fail | N/A | | Pass/Fail | |
| 4) How capable is the individual of implementing a variety of procurement routes? | | | | | | | Pass/Fail | N/A | | Pass/Fail | |
| **Quality criteria - specialist skills - 60%** | | | | | | | | | | |
| 5.1) How capable is the individual of developing a clear client brief with SMART objectives? | | | | | | |  | 12% | | 0 | |
| 5.2) How capable is the individual of developing a procurement strategy which balances the client's appetite for risk with the time, cost and quality variables of the project? | | | | | | |  | 12% | | 0 | |
| 5.3) How capable is the individual of identifying and managing the project risks and issues which may affect the delivery of a project? | | | | | | |  | 12% | | 0 | |
| 5.4) How capable is the individual of providing impartial and succinct assessment of project progress with recommendation for action? | | | | | | |  | 12% | | 0 | |
| 6) How broad is the individuals experience of different project types? | | | | | | |  | 12% | | 0 | |
| **Quality criteria - mentoring skills - 40%** | | | | | | | | | | |
| 1) How capable is the individual of mentoring defining the scope, purpose and objectives of a project ? | | | | | | |  | 7% | | 0 | |
| 2) How capable is the individual of mentoring problem solving and crisis management including handling conflict and closing down projects? | | | | | | |  | 7% | | 0 | |
| 3) How capable is the individual of mentoring time management and meeting deadlines? | | | | | | |  | 7% | | 0 | |
| 4) How capable is the individual of mentoring risk management? | | | | | | |  | 7% | | 0 | |
| 5) How capable is the individual of mentoring developing and managing a budget? | | | | | | |  | 6% | | 0 | |
| 6) How capable is the individual of mentoring organisation and stakeholder engagement at all levels? | | | | | | |  | 6% | | 0 | |

PLEASE COMPLETE THE BELOW SECTIONS

**Detailed Criteria for:**

**Name:**

Please complete the clear boxes below. Throughout, word limits are maxima, and we will disregard any content that exceed them.

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| **SPECIALIST SKILLS QUESTIONS** | | | | | | | | | |
| **4) Please indicate which of the following procurement routes you have experience of implementing or working with to deliver a construction project. (NB your examples can include heritage and/or non-heritage projects). You need to demonstrate experience in at least two of these different procurement routes. In your case studies, please include: title of project, summary of your role, why that procurement route was chosen, what was the outcome/what was delivered.** | | | | | | | | | |
| **4.1) Traditional (300 words)** | | | | | | | | | |
| The total construction cost (including fees) of this case study? – < £2m; £2m-£5m; >£5m | | | | | | | | |  |
|  | | | | | | | | | |
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| **4.2) Design and build (300 words)** | | | | | | | | | |
| The total construction cost (including fees) of this case study? – < £2m; £2m-£5m; >£5m | | | | | | | | |  |
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| **4.3) Management contracting (300 words)** | | | | | | | | | |
| The total construction cost (including fees) of this case study? – < £2m; £2m-£5m; >£5m | | | | | | | | |  |
|  | | | | | | | | | |
| **4.4) Construction management (300 words)** | | | | | | | | | |
| The total construction cost (including fees) of this case study? – < £2m; £2m-£5m; >£5m | | | | | | | | |  |
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| **5) Please briefly summarise your experience of undertaking the following roles on a construction project for buildings/structures/sites of heritage interest. You may use one or more heritage project(s) in your answer:** | | | | | | | | | |
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| **5.1) Developing a clear client brief with SMART objectives (including access arrangements and environmental sustainability) (300 words)** | | | | | | | | | |
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| **5.2) Developing a procurement strategy which balances the client’s appetite for risk with the time, cost and quality variables of the project (300 words)** | | | | | | | | | |
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| **5.3) Identifying and managing project risks and issues which may affect the delivery of a project (300 words)** | | | | | | | | | |
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| **5.4) Providing impartial and succinct assessment of project progress with recommendations for action (300 words)** | | | | | | | | | |
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| **6. Please indicate which of the following project types you have experience of delivering, including the value of the capital project.** | | | | | | | | | |
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| **Project type** | | | | **Project(s)** | | | | | **Value** |
| 6.1) Repair and conservation of historic buildings/structures/sites: | | | |  | | | | |  |
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|  | | | | |  |
| 6.2) Conversion and/or refurbishment of historic buildings or buildings/structures/sites for new uses e.g. museums, libraries or archives: | | | |  | | | | |  |
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| 6.3) New build facilities in sensitive / historic locations: | | | |  | | | | |  |
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| 6.4) Regeneration of historic parks: | | | |  | | | | |  |
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| 6.5) Complex, large-scale place based regeneration schemes encompassing a number of heritage building/sites: | | | |  | | | | |  |
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| **MENTORING SKILLS QUESTIONS** | | | | | | | | | |
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| **We will require all consultants to provide mentoring support to our grantees. You must therefore demonstrate skills, knowledge, expertise and experience of the following mentoring activities.  In your examples you must demonstrate how you have used coaching, listening and facilitating to support other people to achieve the activities below, whilst ensuring that they did not become dependent upon your ongoing support.** | | | | | | | | | |
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| **1) Defining the scope purpose and objectives of a project (400 words)** | | | | | | | | | |
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| **2) Problem solving and crisis management including handling conflict and closing down projects (400 words)** | | | | | | | | | |
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| **3) Time management and meeting deadlines (400 words)** | | | | | | | | | |
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| **4) Managing risk (400 words)** | | | | | | | | | |
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| **5) Developing and managing a budget (400 words)** | | | | | | | | | |
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| **6) Organisation and stakeholder engagement at all levels (400 words)** | | | | | | | | | |
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| **Declaration** | |  |  |  |  |  |  |  |
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| This must be completed on the Excel template and attached to your submission via the Delta portal. | | | | | | | | |
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| Before returning your ITT, please read and sign below: | | | | | | | | |
|  | | | | | | | | |
| I/We certify that the information supplied is accurate to the best of my/our knowledge and that I/we accept the conditions and undertakings requested in the Questionnaire. I/we understand that false information could result in my/our application being rejected. | | | | | | | | |
|  | | | | | | | | |
| \*Signed | |  | | | | | | |
| Print Name | |  | | | | | | |
| Position | |  | | | | | | |
| Tel. No | |  | | | | | | |
| For and on behalf of | |  | | | | | | |
| Date | |  | | | | | | |