



**INVITATION TO TENDER
PROFESSIONAL SERVICES FOR
NEWTON'S PLACE**

Tender document for Professional Services for Newton's Place

This is an invitation to tender from professional services for the development of museum and community space within a disused Grade II listed church in Newton Abbot. The following professional services are required:

- Project Manager & Quantity Surveyor. Principle Designer services (optional)
- Architectural Services / Principle Designer (optional)
- Structural Engineer Services
- Mechanical and Electrical Engineer

The intention is to appoint each professional service for the entirety of the project with a break clause between RIBA stage 3 and RIBA stage 4 due to the requirement to secure the full funding for the construction phase. All contracts will be with Newton Abbot Town Council.

If the submission is as a Multi-disciplinary approach, there is an expectation that the Town Council will have direct contact, if necessary, with individual disciplines keeping the Project Manager informed in the process.

Background

In the current location, the Newton Abbot Town Council and Museum face significant challenges which results in a lower use of the facilities; namely, the distance from the town centre, accessibility, signage and the space for the Museum displays and storage. These issues have been raised repeatedly in visitor surveys and community consultations and the need to address this is recognised within the Newton Abbot & District Community Plan (2008), the Teignbridge Local Plan (2014) and the Newton Abbot Neighbourhood Plan (2016).

The Former St Leonard's Church premises was purchased by Newton Abbot Town Council in August 2016. It has been disused for the last five years. The site is sufficient to provide an enhanced Museum space, Town Council offices and community space for hire within the current footprint.

The project name is 'Newton's Place'. The vision of Newton's Place is to create an accessible community space that celebrates heritage, town and community and challenges pre-conceived ideas of a museum and Town Council by operating in one welcoming environment.

Although there is designated museum space, the two meetings rooms and communal areas will all be used to display artefacts and tell the stories of Newton Abbot and the surrounding area. It increases the space for the Museum and it challenges the preconceptions of what a museum is or should be. It encourages everyone in the community to learn about their heritage and it becomes a space to celebrate the town, its heritage and its people.

The initial cost plan for the construction was estimated at approximately £1.3m which included a contingency at 20% as recommended by the Heritage Lottery Fund (HLF).

The project secured a first-round funding pass from HLF in June 2017. The current stage is the Development Phase which is anticipated July 2017 – June 2018 with submission for Round 2 application on 15th March 2018. Additional funders have already been identified and the project will benefit from the sale proceeds of the current building at 9 Devon Square.

Work carried out to date:

We have carried out a large amount of project work already. As this is a community space, it is important that all parties to the work understand the importance of working with the community on the project development and the need to work closely with the Project team.

Work complete to date:

(a) Building-related work:

- Purchase of the building, completed 23/08/16.
- Change of Use approved
- Initial architectural brief and feasibility carried out. See plans attached.
- Received in principle approval from Maureen Pearce, Teignbridge District Council's Conservation Officer, who is very supportive of the project
- Heritage Statement produced (see attached) alongside internal and external architectural guides researched and written by a museum volunteer.
- Several surveys carried out, including a structural, heritage specialist, utilities supply and long-eared bats surveys. An asbestos survey has also been carried out followed by specialist removal of a small amount of asbestos found in the organ box.
- Pigeons in the roof space have been removed, along with 6.5 tonnes of guano. Minor repairs to the roof and windows carried out, plus timber treatment.
- The building has been insured and a risk assessment carried out.
- Long eared bats (a protected species) roost in the roof space in the summer months.

(b) Consultation undertaken:

- Two open days at the former church in January where over 500 people attended with extremely positive feedback;
- Follow up community events in April and July; positive feedback and increased level of awareness of the project reported
- Different organisations using active engagement sessions: heritage groups, schools, additional needs groups and over 50's;
- Museum visitor survey September 2015 – present day
- Initial community surveys 'Ideas for the new museum': volunteers, Museum Friends, general community and schoolchildren;
- Local interest groups: CIC, Learn Devon, Kingscare, Devon Carers, Rotary Club, photographic and arts clubs;
- Teignbridge CVS carried out consultation with organisations on our behalf whose clients may use the new space;
- Supporting letters received from the church, conservation officials, heritage groups, community groups, the PEC library and resource centre, local schools, Museum Development Officer, Teignbridge District Council and Newton Abbot's MP.

(c) Museum/activities development:

- Susan Eddisford (Museum Development Officer) and Sam Rowlands (Relationship Manager Museums SW, Arts Council England) are fully supportive of our proposals
- Museum Conservation Officer, Helena Jaeschke, has visited the site, providing initial conservation advice which will require further investigation during the development phase
- Visits to several local museums to review good practice and varying methods of display interpretation.
- Review of the objects in the stores has commenced, and will continue in the development phase.
- Initial themes for the new displays have been developed based on consultations and review of the stores to date
- Initial Museum Design Brief produced and indicative estimate of costs received from designers. The brief has now been developed further, and a revised document will be circulated in mid-August as part of the tender process in the development phase.

(d) Project planning and organisational structure:

- Business Case written
- Project management agreed
- Project Working Group and Project Board established
- Project timetable produced for submission to HLF
- Project budget produced based on initial costings

Deliverables

Phase 1 (known as development phase by HLF)

To take and develop the existing scheme working with the museum designer and community feedback via the community engagement officer to achieve:

- Detailed plans and proposals for capital works for Round 2 submission to HLF by end Feb 2018
- Plans for architectural elements RIBA Stage 2 by end October for progress meeting with HLF
- Completion RIBA stage 3
- Planning permission and Listed Building Consent to be secured by end Feb 2018
- Detailed timetable and costings of delivery phase for Round 2 submission to HLF by end Feb 2018
- Development of the management and maintenance plan document to be submitted for Round 2 HLF.

Phase 2 (known as delivery phase by HLF)

- RIBA 4 to start July 2018

- Project Completion December 2019
- Delivery to agreed timings and budget as detailed in Round 2 submission

Please note that we are considering bringing the RIBA stage 4 to an earlier date i.e. within Phase 1 timings but this would be (a) if feasible within the timeframe and (b) it would be at the Town Council's risk as it falls outside of the HLF timings. Please identify the cost of this element within your proposal.

Newton's Place Team Structure:

A multi-stakeholder Project Board has already been formed to oversee the project.

The Working Group reports to the Project Board on a monthly basis. The Project Manager role would be part of the Working Group and would work alongside the Town Clerk, Museum Curator and other staff plus the consultants involved.

There needs to be a close working relationship between the architect, museum designer and community engagement officer to ensure that community feedback is considered carefully through the process. We would anticipate the architect and museum designer working together from early stages to ensure that the building, the conservation of internal features and the museum design are fully integrated.

Schedule of Services for Professional Services:

Please see Appendix A

Experience, skills and knowledge:

To fulfil this role, the following experience, skills and knowledge are expected.

- Track record in working with listed buildings / conservation work
- Appropriate qualifications for the roles
- Track record of community projects / working with a breadth of stakeholder groups (required for architect)
- Excellent communication and team working skills;
- Track record of delivery of projects on time and to budget.

Timeframe

Phase 1 is scheduled to be completed by end Feb 2018 in order to submit to HLF for Round 2. If this is not possible, please identify this within your submission.

Currently Phase 2 is scheduled with an opening date to the public of Autumn 2019 / early 2020.

Reference documents:

1. Outline Drawings
2. Surveys
3. Newton Abbot Town Council Procurement Strategy

Tender Requirements

a) Intention to tender

Newton Abbot Town Council has invited selected bid-writers to tender for this supply. In addition, the tender document is freely available on the Council's website at www.newtonabbot-tc.gov.uk. Organisations intending to tender should notify the Town Clerk, Phil Rowe, by email to Phil.Rowe@newtonabbot-tc.gov.uk before Friday 25th August 5pm.

b) Questions and Clarifications

Consultants / organisations may request clarification of any items in the tender documents by Thursday 31st August, 5pm. All requests must be emailed to Phil Rowe, Town Clerk, at the above address. Any clarification made by the Council in response to a request will be notified to each consultant / organisation that has emailed their intention to tender. Any changes to the tender documents will also be shared with all potential tenderers.

c) Tender submission

Tenderers must give replies to each of the guidelines below. You should detail how you will meet or exceed the requirements. Do not assume any prior knowledge of your organisation.

d) Guidelines for Tender

In developing your proposal, please address the following:

- How will the project be delivered successfully through your experience in:-
 - heritage /conservation work in the last 5 years
 - community projects in the last 5 years
 - meeting tight deadlines and staying on budget
- How will your proposal meet the Town Council procurement aims
- Costs including time input and rates of key personnel
- CVs of key personnel
- Proposed work schedule /timeplan

Assessment Criteria

We will use the following criteria to assess the proposal:

Criteria	Weighting
Quality of proposal to meet the project brief	70%
Listed buildings /conservation work track record	30%
Community projects	15%
Delivering to time and budget	15%
Meeting Town Council Procurement aims	10%
Price	30%

Fees

Please provide a cost breakdown by phase; development and delivery. The initial cost plan for the construction was estimated at approximately £1.3m which includes a contingency at 20% as recommended by the Heritage Lottery Fund (HLF) and excludes the museum design and installation costs.

Tender Submission

You need to submit your proposal and the complete Supplier Questionnaire.

For Project Manager role: Tenders to be submitted by 5pm on Friday 8th September to: Phil Rowe, Town Clerk, Newton Abbot Town Council by email: Phil.Rowe@newtonabbot-tc.gov.uk.

For all other services: Tenders to be submitted by 5pm on Friday 15th September to: Phil Rowe, Town Clerk, Newton Abbot Town Council by email: Phil.Rowe@newtonabbot-tc.gov.uk.

Please send a hard copy, in plain envelopes marked "Quotation for Professional Services" to:
Phil Rowe
Town Clerk
Newton Abbot Town Council
9 Devon Square
Newton Abbot TQ12 2HN

For Project Manager: It must arrive no later than Tuesday 12th September 2017 12pm.

For other services: It must arrive no later than Tuesday 19th September 2017 12pm.

All tenders will be opened in the presence of at least three people of whom one shall be the Clerk (or designated officer delegated this task) and two shall be members of the Council.

e) Shortlisting and interviews

Should interviews take place, they will be informal in nature and after brief introductions, be conducted on a question and answer basis. No preparation other than the request for quote submission will be required.

f) Timescales

Timescale for PROJECT MANAGER

Action	Date
Tender opportunity advertised by NATC	Friday 11 th August
Email intention to tender by supplier	Before Friday 25 th August
Tender questions answered by NATC	Until Thursday 31 th August 5pm
Tenders to be submitted by email (consultant)	Friday 8 th September 12pm
Tenders opened and short list confirmed (NATC)	Tuesday 12 th September
Notify successful candidates for interviews	Wednesday 13 th September
Interviews at Newton Abbot	Thursday 14 th Sept / Friday 15 th Sept
Confirmation to successful applicant	Friday 15 th Sept
Commence – Initial briefing by	Monday 18 th Sept

Timescale for all other posts

Action	Date
Tender opportunity advertised by NATC	Friday 11 th August
Email intention to tender by supplier	Before Friday 25 th August
Tender questions answered by NATC	Until Thursday 31 th August 5pm
Tenders to be submitted by email (consultant)	Friday 15 th September 12pm
Tenders opened and short list confirmed (NATC)	Tuesday 19 th September
Notify successful candidates for interviews	Wednesday 20 th September
Interviews at Newton Abbot	Thursday 21 st Sept / Friday 22 nd Sept
Confirmation to successful applicant	Friday 22 nd Sept
Commence	Monday 25 th Sept

Appendix A

SCHEDULE OF SERVICES:

The following Schedule of Services are broad in their description and the Council anticipate that the Project Manager and individual disciplines will tailor to the needs of the project and a final schedule of service will be signed off as part of the contractual agreements.

- The Project manager will coordinate and manage the services.
- The duties for each discipline will generally follow the RIBA Plan of Work 2013 and the Role Specifications described in the RIBA Standard Agreement 2010 (revised 2012) Part 1.
- Suppliers need to comply with the statutory and the Employers Health and Safety Policy's
- All appointed consultants are to comply with both the requirements and spirit of the Construction (Design & Management) Regulations 2015 (CDM 2015) and associated guidance together with any specific institutional contractor guidelines or similar documentation. The Principal Designer will be responsible for ensuring that the design team (and contractor) have the requisite skills and competency to fulfil their role under the CDM Regulations 2015.
- Each discipline will attend meetings that are required to complete the deliverables of the Project.
- In addition to meetings that would be generally associated with the deliverables, the Architect and Project Manager should allow for the inclusion of up to two (2) presentations to Councils members and up to two (2) meetings with the community during the development and delivery phase.

PROJECT MANAGER

RIBA STAGES 1 – 2

FEASIBILITY AND OUTLINE PROPOSALS

- Receive client briefing, take minutes and issue to all parties.
- Agree detailed programme with client and design team, monitor and chase up performance.
- Contribute where possible to the formulation of the Pre-Construction Information Pack.
- Agree nature and scope of site investigation with design team, ensure these are ordered by the respective discipline responsible for and monitor.
- Co-ordinate sketch design and costs with design team to meet programme, and report to client.
- Arrange and co-ordinate design team meetings, take minutes and issue to all parties.
- Assist with arranging local consultation meeting with interested parties; 1 day.
- Assist design team with all statutory and local authorities' consultations, where appropriate.
- Meet with client to sign off scheme at completion of RIBA stage 2.
- Arrange for submission of Planning Application following client sign off at RIBA stage 2.
- Monitor planning application and report to client.

RIBA STAGE 3 – 4

DETAILED DESIGN / TENDER

- Update and maintain a detailed programme
- Co-ordinate work of other consultants and report to client.
- Co-ordinate consultants with Local Authorities and other Statutory Authorities and ensure that applications are made in accordance with programme dates.
- Ensure client is regularly updated on costs and provide input if necessary.
- Monitor detailed design; agree final layouts with client prior to tender.
- Provide input to and monitor the production of tender documentation.
- Ensure pre-tender estimate is provided and review the project with respect to value and buildability.
- Obtain approval to proceed to tender from client.
- Liaise with client on proposed tender list.
- Co-ordinate the issue of all tender documentation.
- Receive tenders and report on tenders to client.
- Review project as directed by client to ensure elimination of unnecessary costs without impact on brief.
- Co-ordinate the production and signing of contract documents.
- Establish contract programme and contractors resource.
- Confirm approval has been given to proceed with the contract.

RIBA WORK STAGE 5 & 6

CONSTRUCTION

- Arrange, chair and minute pre-contract meeting.
- Undertake administration of the contract as either CA (JCT) or PM (NEC) depending upon form of contract employed.
 - Monitor the progress of the works and the resources of the contractor and sub-contractors ensuring information is produced diligently by the consultants.
 - Ensure all variations to the contract are approved and recorded.
 - Arrange, chair and minute site meetings.
 - To ensure that parties are gathering information in relation to the H&S file and this is ready for handover.
 - Ensure co-ordination of commissioning taken place with all necessary testing.
 - Co-ordinate preparation of record drawings and operation and maintenance of the building services manuals for submission to the client together with the Health & Safety file and statutory certificates.
 - Attend and chair post completion review meeting.
 - Arrange meeting on site and prepare list of defects prior to expiry of making good defects period.
 - Ensure all defects are attended to and rectified.
 - Issue all certificates for completion of projects.

QUANTITY SURVEYOR

RIBA STAGES 1 & 2

- Liaise with Client and other consultants to determine Client's initial requirements and subsequent development of the full brief.

- Advice on procurement options.
- Prepare initial budget estimate from feasibility proposals.
- Prepare overall project cost calculation and cash flow projections.
- Prepare and develop preliminary cost plan.
- Advise on cost of design team's proposals, including effects of site usage, shape of buildings, alternative forms of design and construction as design develops.
- Attend design team meetings as necessary to assist in the smooth running of the project.

RIBA STAGE 3

- Monitor cost implications during detailed design stage.
- Maintain and develop cost plan, prepare periodic reports and updated cash flow forecasts.
- Contribute to evaluation of value engineering options.
- Attend design team meetings as necessary to assist in the smooth running of the project.

RIBA WORK STAGE 4

- Advise on tendering and contractual arrangements taking into account the Client's priorities and information available from designers.
- Advise on insurance responsibilities and liaise with Client's insurance adviser.
- Advise on warranties.
- Advise on bonds for performance and other purposes.
- Prepare tender documentation in conjunction with the Client and members of the design team.
- Advise on use and / or amendment of standard forms of contract or contribute to drafting of particular requirements in association with Client's legal advisers.
- Advise on shortlisting prospective tenderers.
- Investigate prospective tenderers and advise Client on financial status and experience.
- Prepare pre-tender estimate, issue to client / design team and obtain instructions to send project out to tender.
- Arrange delivery of documents to selected tenderers.
- Check tender submissions for accuracy, level of pricing, pricing policy etc.
- Advise on errors and qualifications and, if necessary, negotiate thereon.
- Advise on submission of programme of work and method statement.
- Review financial budget in view of tenders received and prepare revised cash flow.
- Prepare report on tenders with appropriate recommendations.
- Advise on letters of intent and issue in conjunction with Client's advisers.
- Draw up forms of contract, obtain contract drawings from members of design team and prepare and deliver to both parties contract copies of all documents.

- **RIBA STAGES 5 & 6**

- Attend pre-start meeting.
- Prepare recommendations for interim payments to contractors, subcontractors and suppliers in accordance with contract requirements.
- Value designer's draft instructions for varying the project before issue.
- Prepare cost reports in agreed format at monthly intervals during the course of construction operations.
- Attend monthly site progress meetings
- Attend handover meeting at Practical Completion

- Prepare the final account and negotiate settlement with the contractor.
- **GENERALLY - ITEMS NOT INCLUDED IN BASE FEE QUOTE**
- To be charged at rates agreed in advance with the client should these services be required.
- Prepare appropriate documentation, if required, to adjust the tender received to an acceptable contract sum.
- Preparation of whole life costings and / or cost in use studies.
- Assess Contractor's Loss and Expense Claims,
- Provide breakdowns of cost for VAT and / or other tax advice.

PRINCIPLE DESIGNER

The Services comprise the provision of advice and support to the Employer in respect of the CDM Regulations including but not limited to:

- Advising the Employer on their obligations as Client under the CDM Regulations
- Advising on the methods to be adopted to check the competence and adequacy of resources of proposed Designers and Contractors;
- Reviewing with the Employer and/or their appointed representative, the competence and adequacy of resources of all proposed Designers and Contractors Work Package
- Advising on the service related information concerning the Site, which the Employer and/or their appointed representative should make available to the Design team and the contractor
- Liaising with the all contractors appointed as a Designer to identify health and safety hazards and ensuring that the contractors comply with their duties under the CDM Regulations
- Preparing a Pre-Construction Information Pack in the format required by the CDM Regulations and where required liaising with the Employer and/or their appointed representative to procure the required information
- Liaising with the Employer and/or their appointed representative with regards to the proposed mobilisation period and submit all of the required notifications to the Health & Safety Executive (HSE)
- Liaising with the Principal Contractor, Designers and other Contractors appointed by the Employer and/or their appointed representative when the Construction Phase Plan has been suitably developed
- Liaising with the Principal Contractor, Designer and other Contractors appointed by the Employer to procure the required information to prepare and deliver the Health & Safety File to the Employer in conformity with the requirements of the CDM regulations.

The provision of the forgoing services is provided as required at any Stage or phase

ARCHITECT

The scope of the Architects services will include the Work Stage services and Role Specification as 'Designer' as defined in Part 1 of RIBA Standard Agreement 2010; Schedules (2012 revision – RIBA Plan of Work 2013 compatible version) and include 'other services' as defined by 3a, 3b and 3c, 5, 10, 11, 23, 24 of Part 3 of RIBA Standard Agreement 2010 (revised 2012).

STRUCTURAL ENGINEER

The scope of the Civil and Structural Engineering services is based on the ACE (2009) Schedule of Services Part G(a) – Civil and Structural Engineering Single.

The civil and structural work elements will generally comprise:

- Providing of civil and structural options based upon initial brief including design schematics, staging and programme advice, buildability and maintenance issues;
- Advising on and where required providing such site investigation, topographical surveys, testing and the like as is required to progress the design;
- Detailed design, specification and detailing of civil and structural works,
- Providing advice and input into value engineering studies, optioneering studies and/or life cycle cost studies including where required, attendance at Workshops;
- Advising on and where requested appointing such other specialist Contractors/consultants required to support the design process;
- Consulting as required with local and/or statutory authorities; submitting and/or assisting in the submission for all required approvals, consents etc
- Providing advice to the Principal Designer on Health and Safety issues associated with the design and/or its implementation including risk assessments and the provision of information for the Pre-construction Information Pack.
- Participating as requested in the project handover process including but not limited to: - (a) Undertaking a final inspection of the works and agreement of the snagging lists (b) Procuring "As Built" information and amending drawings, specifications and such other design information for inclusion in the Health and Safety File (c) Reviewing and accepting of any proposed remedial measures (d) Attending any hand over meetings.

MECHANICAL AND ELECTRICAL ENGINEER

The scope and duties for the Mechanical & Electrical Engineer are based on the ACE (2009) Schedule of Services Part G(b) – Detailed Design in Buildings and part G(c) Performance design in buildings.

The Mechanical and Electrical Engineer work elements will generally comprise design, technical consultancy and engineering including but not limited to:

- Providing design options based upon initial brief including design schematics, staging and programme advice, buildability and maintenance issues;
- Advising on and where required providing such site investigation, topographical surveys, testing and the like as is required to progress the design;
- Detailed design, specification and detailing of mechanical and electrical works
- Providing advice and inputting into value engineering studies, optioneering studies and/or life cycle cost studies including where required, attendance at Workshops;
- Advising on and where requested appointing such other specialist contractors/consultants required to support the design process;
- Consulting as required with local and/or statutory authorities;
- Submitting and/or assisting in the submission for all required approvals, consents and the like;
- Providing advice to the CDM Principal Designer on Health and Safety issues associated with the design and/or its implementation including risk assessments and the provision of information for the Pre-construction Information Pack;
- Detailed design, specification and detailing of mechanical and electrical services including where required the thermal and/or performance modelling of the proposed works;
- Participating as requested in the project handover process including but not limited to: - (a) Undertaking a final inspection of the works and agreement of the snagging lists (b) Procuring "As Built" information and amending drawings, specifications and such other

design information for inclusion in the Health and Safety File (c) Reviewing and accepting of any proposed remedial measures (d) Attending any hand over meetings.