

# RIDGE



## **The Almonry Restoration Project**

ITQ – Cost Management

February 2025





# The Almonry Restoration Project

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# 1

## Project Overview

# The Almonry Restoration Project

## Project Overview

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### Our History

The Almonry, a striking building dating back to the 14<sup>th</sup> and early 15<sup>th</sup> centuries, was once the home of the Almoner, a monk from the Benedictine Abbey. After the dissolution of the Abbey by Henry VIII, the Almonry became the residence of its final Abbot, Philip Ballard. Today, the Almonry stands alongside two churches, a bell tower, and a cloister arch, the last remnants of what was once the third largest abbey in England.

Over the years, the Almonry has served many purposes, from an alehouse and offices to tea rooms and a private home. In 1929, it was acquired by Evesham Borough Council and, in 1957, opened as a museum. It continues to be owned and supported by Evesham Town Council. The museum boasts a fascinating and eclectic collection, spanning from prehistoric times to the 20<sup>th</sup> century. Spread across two floors and a lovely garden, the exhibits offer a captivating look at Evesham's rich history and development. Highlights also include displays on the Abbey, the Battle of Evesham in 1265, local horticulture, archaeology and fossils, as well as a Victorian school room.

### Our Future

In 2017, the Almonry Museum was placed as a Priority B rated building on the Historic England Heritage at Risk Register. This means the building is at high risk of rapid deterioration and urgent works are required to restore the building and extend it's life in order to continue to serve the community of Evesham and showcase it's fascinating history.

The Almonry plays an important community role serving as a 'free to enter' attraction supporting the local community hosting events throughout the year, including children's workshops, demonstrations and exhibitions.





# The Almonry Restoration Project

## Project Overview



### Our Plans

The purpose of the construction work is to restore the building to its native form, whilst repairing and replacing building elements which are faulty, inadequate, deteriorated or unfit for purpose.

Works include, but are not limited to, the following items. Please note this list is not exhaustive and the scope of services should be referred to for full details.

- Replacement roof & insulation
- Repointing
- Replace existing heating
- Replace glazing
- Repair / replace timber structural columns
- Replace rainwater goods
- Increase and relocate w/c facilities
- Replace fire alarm system
- Install new data, CCTV and external lighting
- Repairs to external boundary walls and garden paths



# 2

## Invitation to Quote (ITQ) Requirements

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## Invitation to Quote (ITQ) Requirements

Please see below the evaluation criteria which will be used to assess proposals.

Reference	Sub-Criteria	Weighting
1	Point of Contact	Pass / Fail
2	Previous Experience	20%
3	Team Organogram	5%
4	Team CVs	20%
5	Methodology	25%
6	Pricing and Resource Schedule	30%
7	Legal	Pass / Fail

Quality Scoring Criteria (scores out of 5)	
0	No information provided
1	Information provided but fails to address the scope and services required
2	Information provided which addresses some of the scope and services required
3	Information provided addresses all the scope and services required
4	Information provided addresses all the scope and services required and begins to provided additional value
5	Information provided addresses all the scope and services required and provides additional value and innovation in approach

Pricing Scoring Criteria (scores out of 40% following moderation)	
Score is calculated using the below formula	
$\frac{\text{Lowest Compliant Fee}}{\text{Submitted Compliant Fee}} \times \text{Weighting (30\%)}$	

# The Almonry Restoration Project

## Invitation to Quote (ITQ) Requirements

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Anyone wishing to submit a quotation must adhere to the below guidance and instructions at all times.

Quotations are invited for organisations to bid for works covered in this document only.

Quotation responses should be submitted in line with the below timescales

Invitation to quote issued to suppliers

05/02/2025

Clarification deadline

12/02/2025

Meet the Team Day (On Site)

13/02/2025 (11:00 – 12:30 at the Almonry)

Deadline for Quotations to be Submitted

19/02/2025

Award Notice Issued

05/03/2025

Commencement Date

13/03/2025

Queries and responses should be submitted via Contracts Finder ahead of the deadline identified above and should be in a single pdf attachment.

It should be noted that consultant appointments will be made directly to Evesham Town Council, with Ridge and Partners LLP providing contract administration and project/programme management across all contracts.

Responses should address the below criteria and include the relevant information requested.

- 1 A key point of contact should be identified for the submission and contract
- 2 Three case studies should be included to demonstrate experience on projects of similar type, value and client
- 3 A team organogram should be included to demonstrate the team who would be delivering the project services
- 4 CV's for the key project team members should be included, demonstrating the individuals role, qualifications, experience and suitability
- 5 A methodology should be included to demonstrate your approach to delivering the scope of services enclosed
- 6 A pricing and resource schedule should be provided which demonstrates your commercial offer for the project (including day rates)
- 7 Issue of standard terms and conditions for review by the club



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## Invitation to Quote (ITQ) Requirements

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The project is currently Architecturally within RIBA Stage 3.

The current project timescales are noted below and should be used as the baseline for the formation of your fee proposal.

### Design Commencement

13/03/2025

### Design Completion

23/06/2025

### Start on Site

3Q 2025

### Completion on Site

Q1 2027

The project team is outlined below for information.

### Client

Evesham Town Council

### Project Management

Ridge and Partners LLP

### Lead Designer

Arnold Bartosch



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## Scope of Service

# The Almonry Restoration Project

## Scope of Service – Cost Management

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### Service Requirement

#### 1.0 General Services

- 1.1 Carry out all services necessary to deliver the Project that could be reasonably expected of a suitably qualified competent and experienced Quantity Surveyor when carrying out services on Projects of similar size, scope, character and complexity as the Project including but not limited to the following:-
- 1.2 Gain a thorough understanding of the Client's conservation policies and other information relating to the architectural and historical significance of the Property in which the Project is taking place.
- 1.3 Progress the Project in line with the Client's policies and procedures including but not limited to the Client Project Management Framework and General Requirement for Building works.
- 1.4 Ascertain the Client's requirements in respect of collateral warranties, performance bonds, parent company guarantees and general insurances and ensure these remain in the Project documentation as appropriate.
- 1.5 Comply with the Construction (Design and Management) (CDM) Regulations insofar as they relate to this Appointment.
- 1.6 Receive Client's instructions and information about the Project.
- 1.7 Assist in the assembly of the Professional Team including contribute to the design responsibility matrix, information exchange points and the Project execution plan.
- 1.8 At all stages in the Project, advise the Client on the adequacy of warranties, guarantees and bonds offered from other Specialists , Professional Team, Contractors and Sub Contractors utilised on the Project.
- 1.9 At all times collaborate, liaise and cooperate with all members of the Project and Design Team.
- 1.10 Attend Client, Design, Project, Site and other meetings as necessary under this appointment.
- 1.11 Communicate with the Client, Project Manager and the Professional Team on cost and quality issues.
- 1.12 Collaborate with the Project Manager and the Professional Team in seeking from the Client any further information needed so that the Professional Team can perform their agreed services for the Client.
- 1.13 Liaise with the PM, and prepare and maintain a cash flow forecasts and other statements monitoring the expenditure throughout the Project. Prepare regular / monthly cost reports. Advise the Client of any decisions required and obtain authorisation.



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## Scope of Service – Cost Management

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### Service Requirement

- 1.14 Liaise as may be necessary with the Project Manager and the Professional Team to agree a programme for the whole of the design and construction of the works.
- 1.15 At all stages, contribute to services in connection with risk management, contributing to Project risk register, advising on mitigation measures and suitable contingency allowances.
- 1.16 At all stages, contribute to services in connection with value engineering to meet the requirements of the agreed client brief.
- 1.17 Contribute to Project execution plan for all matters which the consultant is responsible for.
- 1.18 If required, prepare documentation and/ or provide advice to support dispute resolution proceedings and/ or litigation proceedings. Attend if required arbitration and/ or litigation proceedings.
- 2.4 Advise the Project Manager on any required specialist services, including internal Client specialists, external consultants / Contractors / sub-Contractors / suppliers required in connection with the Project.
- 2.5 Liaise with the Project Manager and co-ordinate advice to the Client on any structural, building, condition, measured, ground investigations, utilities and any other surveys required in connection with the Project.
- 2.6 Contribute to discussions on the Design Responsibility Matrix and Information Exchanges points.
- 2.7 Contribute to discussions with the Professional Team and make recommendations on the design services to be undertaken by Contractors, Sub-Contractors and 3rd Party Specialists.

### **2.0 Preparation and Brief Stage**

- 2.1 Assist the Project Manager and work with the Professional Team to define the Client's requirements and contribute to the preparation of the Project Brief.
- 2.2 Visit the Site. Advise the Client on any factors likely to affect cost, time or method of implementation.
- 2.3 Advise on the need for opening up

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## Scope of Service – Cost Management

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### Service Requirement

- 2.8 Make recommendation on if Building Information Modelling (BIM) should be utilised in the production of Information and if so provide a schedule that describes the BIM information to be delivered to an agreed information delivery plan.
- 2.9 Liaise with Professional Team and review all available specialist reports. Summarise key findings for inclusion in final feasibility report and make recommendations for Client approval.
- 2.10 Define the Project Budget and advise on the cost of alternative designs and construction options.
- 2.11 Liaise with Professional Team and prepare a Preliminary Project Cost Plan and cash flow forecast. Discuss Cost plan with Project Manager, Client and other relevant members of the Professional Team and seek consensus.
- 2.12 Advise on and evaluate capital tax allowances, grants or other financial assistance available in respect of the Project.
- 2.13 Advise on VAT payable in respect of the Project. Provide a breakdown of the cost plan, interim valuations and final accounts or similar financial statement for VAT purposes.
- 2.14 Advise on Programme for design and construction of the Project.
- 2.15 Discuss with the Client and the Professional Team and make recommendations on the type of construction contract and the timing of tender activities in relation to the various stages of design.
- 2.16 Liaise with the Project Manager and other members of the Professional Team and advise on tendering and contractual procurement options. Prepare recommendations for the Client's approval.
- 2.17 Prepare sustainability options cost studies.
- 2.18 Prepare accessibility options cost studies.
- 2.19 Prepare security options cost studies.
- 2.20 Advise on financial impact of propose logistics plan.
- 2.21 Contribute to risk mapping workshop and advise on appropriate levels of provisional sums, PC Sum, Contingencies and preparing appropriate daywork clause.
- 2.22 Consider all information available and make recommendations to the Client and Project Manager on the financial viability of the works for all matters which the designer is responsible for.

### **3.0 Design Stage**

- 3.1 Review feasibility report and develop Project programme, Cost Plan and all feasibility strategies addressing any issues / progressing any work outstanding from previous stages.

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## Scope of Service – Cost Management

### Service Requirement

<p>3.2 Prepare stage reports in accordance with agreed information exchanges and submitting to the Client and the Professional Team.</p>	<p>building components and systems. Prepare recommendations for the Client's approval.</p>
<p>3.3 Advise on a structure and procedure for cost management. Establish review, approval, variation and reporting procedures.</p> <p>3.4 Advise on the cost of the Professional Team's proposals, including effects of the site usage, alternative forms of design, procurement and construction etc. Advise on any cost variances to the allowances contained in the Project Cost Plan, updating said cost plan at agreed stages during the design period.</p>	<p><b>4.0 Tender Stage (Pre-Construction Stage)</b></p>
<p>3.5 Liaise with the Project Team and prepare, maintain and develop a detailed Project Cost Plan and cash flow forecast.</p>	<p>4.1 Review the Project execution plan including brief, scope, cost, programme, risk mapping, pre-construction information. Update and circulate as necessary with the Professional Team.</p>
<p>3.6 Collaborate with the Project Manager and any Other Consultants to prepare the final proposals for presentation to the Client, drawing attention to any significant differences from the final project brief.</p>	<p>4.2 Provide all information and documentation required to procure demolition, strip-out, site investigation and enabling works contracts required before the performance of the Building Contract.</p>
<p>3.7 If required, prepare any pre-application documentation to support any statutory consent applications</p>	<p>4.3 Assist in advising the Client and the Professional Team on the need for any special conditions of contract relevant to the works and on appropriate forms of contract and invitations to tender for the works. Prepare project preliminaries and proposed contract amendments for inclusion in final tender pack.</p>
<p>3.8 Advise on any long delivery building components and systems. Prepare recommendations for the Client's approval.</p>	<p>4.4 Liaise with the Professional Team and prepare / obtain all prelims, specifications, schedules, tender drawings PCI and contract amendments as required to for the final tender documentation. Prepare final tender pack ready for distribution to Contractors.</p>
<p>3.9 Advise on any specialist/proprietary</p>	<p>5 Prepare bills of quantities for inclusion in tender pack.</p> <p>4.6 Price bills of quantities to provide a-pretender estimate for comparison with tenders.</p>



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## Scope of Service – Cost Management

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### **Service Requirement**

- 4.7 With the Project Manager and Professional Team investigate prospective tenderers and advise the Client on their financial status, technical competence and appropriateness for the role. Prepare recommendations on Tender List for the Client's approval.
- 4.8 Arrange delivery of final tender pack to selected tenderers and ascertain any changes to their intention to price.
- 4.9 Support Contractor visits and answer any associated queries

### **5.0 Tender Action**

- 5.1 Check tender submissions for errors, omissions, exclusions, qualifications, inconsistencies etc. Provide an initial appraisal and commentary to Project Manager and Client. Review and agree tender report with Construction Manager and other relevant members of the Professional Team.
- 5.2 Attend and participate in the pre- and post- tender interviews process making recommendations for inclusion in tender report.
- 5.3 Advise on the tenderers' design and construction program and method statements.
- 5.4 Consider any alternative designs for the works submitted by Contractors.
- 5.5 Advise on the relative merits of tenders, prices and estimates received for the execution of all or part of the works.

- 5.6 Conduct negotiations with tenderers. Prepare documentation to confirm adjustments to the tender sums. Prepare recommendations for inclusion in the tender report.
- 5.7 Liaise with the Client and the Professional Team and advise on methods of progressing design and/or construction works prior to the execution of the Building Contract.
- 5.8 Obtain contract documentation from the Client and the Professional Team. Liaise with the Client's legal advisors and prepare contract documents and deliver to the Client and the Contractor for execution.

### **6.0 Construction Stage**

- 6.1 Attend pre-start meeting and make recommendations on a suitable structure and procedure for quality management. Establish review, approval, variation and reporting procedures..
- 6.2 Visit the Site periodically and assess the progress of the Project for interim payment purposes.
- 6.3 Respond to Contractor requests for information and site queries as reasonably required for construction.
- 6.4 Assist in resolving any day-to-day queries and disputes on the Site
- 6.5 Carry out off-site inspections of sub-Contractors' and suppliers' premises and off site materials included in valuations. Advise on suitable vesting certificate to protect Client.

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## Scope of Service – Cost Management

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### Service Requirement

6.6 Negotiate, agree and advise on the cost of variations prior to the issue of instructions by the Contract Administrator under the Building Contract.

6.7 Prepare and review valuations for interim payments to the Contractor. Issue written comments to the Project Manager, Contract Administrator and Client.

6.8 Attend pre-handover meeting and inspection and, in conjunction with the Professional Team, record and report any defects observed. Provide a completion defects list to the Project Manager.

6.9 Coordinate and make recommendation to Client / Contract Administrator on appropriate point to issue partial possession, sectional completion and/or practical completion certificates.

6.10 Contribute to preparation of handover plan for all matters which the designer is responsible for.

### **7.0 Handover and Close Out Stage**

7.1 Contribute all documents reasonably required to achieve handover strategy.

7.2 Assist the Client during initial occupation period. Ensure all relevant documentation is made available to the Client and or building user.

7.3 Advise on resolution of any post

completion defects.

7.4 Facilitate agreement to the final account or similar financial statement from the parties to the Building Contract. Negotiate, agree and prepare the final account or similar financial statement for client approval.

7.5 Advise on the quantum and recovery of any associated liquidated and ascertained damages.

### **8.0 In Use Stage**

8.1 Contribute to the administration of an 'In Use' defects administration plan provide advice to resolve matters where reasonably required.

8.2 Contribute to End of Project post-occupation evaluation process in compliance with the Client's Project Management Framework.

8.3 Produce a final Project Cost Plan in the Client's Heritage Cost Planning template, summarising the total actual cost of the Project on completion of the Project.

8.4 Prepare a reinstatement cost assessment for insurance purposes on completion of Project. Any renewable technologies incorporated into the Project need to be highlighted separately.

# 4

## Legal



## The Almonry Restoration Project

### Legal

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Please provide your standard terms and conditions which will be reviewed by the client legal advisor for proposed amendments.



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