



**INVITATION TO TENDER**

*for the provision of*

THE SERVICES

*of*

**ARCHITECT/BUILDING SURVEYOR**

*for*

**PROJECT DEVELOPMENT FOR REPAIRS TO ST MARGARET DE WESTWICK, NORWICH**



*(View from the south)*

## 1. Introduction

### Designation

Heritage Category and Grade: I

List Entry Numbers: 1051898

### Location

County: Norfolk

District: Norwich

National Grid Reference: TG 22657 08812

The Medieval Church of St Margaret de Westwick on St Benedict's Street, Norwich dates from the 14<sup>th</sup> century and has been on Historic England's Heritage at Risk (HAR) register for over a year. Under the care of Norwich Historic Churches Trust (NHCT) the church is currently used as an art gallery and exhibition space. The NHCT are in the process of applying to Historic England for a HAR project development grant to inform and hopefully carry out repairs to enable it to be removed from the HAR register along with preserving the building for generations to come. It is one of 18 churches cared for by NHCT in the city of Norwich.

Norwich Historic Churches Trust (elsewhere referred to as the client) wishes to procure the services of a Conservation Accredited Lead Consultant to carry out one of the following accreditations:

- Register of Architects Accredited in Building Conservation (AABC), operated by AABC Register Ltd.
- Directory of Accredited Conservationists operated by the Chartered Institute of Architectural Technologists
- Conservation Register SCA category only, operated by the Royal Institute of British Architects (RIBA)
- Building Conservation Accreditation Scheme, operated by the Royal Institution of Chartered Surveyors (RICS), for a range of professionals including chartered building surveyors and chartered quantity surveyors.

The lead consultant will need to demonstrate significant and demonstrable experience of developing, specifying and managing similar projects and delivery work in relation to the repairs and associated work at St Margaret's. At the same time, the client wishes to appoint other consultants as required to deliver the project such as:

- Principal Designer as required by CDM Regulations 2015;
- Archaeologist (MCifa accredited);
- Arboriculturalist (MarborA accredited);
- Ecologist;
- Structural Engineer with demonstrable experience where a Conservation Accredited Architect, Chartered Architectural Technologist or Chartered Surveyor is the Lead Adviser.

Please advise where these consultants' roles can be provided by the lead consultant company.

The appointment of consultants will be direct with the client but the lead consultant will be required to manage and coordinate sub-consultants, other appointed consultants and contractors for each phase of work. This to include assessing invoices, checking, approving and forwarding to the client for payment.

The lead consultant should provide:

- A short statement (max 1,500 words) detailing relevant experience, methodology, programme and project team experience;
- A programme for each phase of work;
- Demonstrable experience similar project: 2 case studies (max 2 sides of A4 each);
- CVs of the lead consultant and project team members. Schedule of personnel and roles.
- A full breakdown of fees for the lead consultant and project team for each phase of work.

Insurances should be provided as follows:

- Professional Indemnity Insurance - £1million
- Public Liability Insurance - £1million

Outcomes required:

- Completion of RIBA stages 1-4 (**phase 1**)
- Completion of RIBA stages 1-4 including completed tender for contractor for phase 3 (**phase 2**)
- Completion of RIBA stages 5-7 (**phase 3**)

The anticipated procurement and project development programme is:

Invitation to Tender issued	14 <sup>th</sup> October 2020
Tender return	6 <sup>th</sup> November 2020 (12 noon)
Appointment	W/C 9 <sup>th</sup> November 2020
Phase 1 and 2	Commencement as soon as possible and to be advised in bid; completion by January 2022 (subject to grant approval by HE)
Phase 3	TBC (most likely Jan 2022)

Instructions and information for quotes

- The quote must be received by **12pm (noon) on Friday 6<sup>th</sup> November 2020** (email preferred). Quotes received after the date and time may be excluded at the discretion of the client.
- Suppliers must ensure that any other information requested as part of the quote is included in their response.
- Suppliers shall bear all their own costs and expenses incurred in the preparation and submission of the quote.
- If suppliers have any queries or requests for further information they must be submitted no later than **Monday 2<sup>nd</sup> November**.
- The client does not bind itself to accept the lowest or any quote.
- Tenderers shall treat the ITT as confidential.
- No quote or any part of it shall be deemed to have been accepted unless such acceptance shall have been notified to the supplier in writing by the client. The client reserves the right to accept any part of the quote.
- Quotes shall remain valid for acceptance for a period not less than sixty calendar days from the final date for submission
- It is the supplier's responsibility to familiarise itself with the work to be performed in order that the quote will be robust.

- It is the supplier's responsibility to confirm that they have not been convicted of any of the offences referred to in Regulation 57 of the Public Contracts Regulations 2015.

## 2. Current Condition

There is on-going concern about the external condition of the east end. Internally, the southern aisle arches and the arches of the south chapel have shown signs of movement in the past. The north vestry roof has largely failed along with issues with the tower lead and elsewhere.

The installation of appropriate propping system for the south chapel roof purlin needs to be undertaken at the earliest opportunity along with emergency works to the east end flintwork.

Photographs and latest Quinquennial Report (2018) are available upon request.

Please Contact Mark Wilson should you wish to make a site visit (contact details at the end of this document).

## 3. Development Work RIBA 1-4 (phase 1) – please note **Break Clause**

The appointed Lead Consultant for Phase 1 will be required to complete the following tasks:

- a) Undertake measured and drawn survey as necessary to complete Phase 1, 2 and 3. Produce a set of drawings in CAD format (ref para 3.4 Products in <https://historicengland.org.uk/images-books/publications/drawing-for-understanding/heag119-drawing-for-understanding/>;) including a site plan 1:500, floor plan 1:50, two elevations and 1 section 1:50 and other significant details to be drawn to appropriate scaling, to clearly show the works and to accord with building recording conventions (ref para 3.2 scales for hand measuring and survey drawings <https://historicengland.org.uk/images-books/publications/drawing-for-understanding/heag119-drawing-for-understanding/>).

Allow for use of drawings by other members of the team.

- b) Provisional: provide a price and specification for a digital survey. Allow for use of drawings by other members of the Team.
- c) Review of the current QI and any information available; produce a brief condition survey report with recommendations and incorporating specialists' advice. Arrange and undertake investigations and inspections as required to complete Phase 1.
- d) Manage and coordinate sub-consultants, other appointed consultants and contractors. This to include assessing invoices, checking, approving and forwarding to the client for payment. Management of the overall Phase 1 budget.
- e) Include for appointment of Structural Engineer / Conservation accredited Architect, Chartered Building Surveyor or Chartered Architectural Technologist with relevant significant past experience in dealing with Listed and historic buildings, to input where required on the project.
- f) Include for the appointment of an Arboriculturalist to advise and provide tree risk assessment and management plan. Include estimated costs for removal/management of vegetation as necessary to complete each phase of work.
- g) Include for the appointment other consultants as necessary (e.g. ecologist, historic buildings consultant).

- h) Include for the appointment of an Asbestos Consultant, to advise about potential asbestos debris on site and their management during each phase of work.
- i) Include for the appointment of an Archaeologist to provide specialist advice including preparation of WSI and method statement and monitor any excavations as necessary to complete the current phase of work.
- j) Opening up (to better understand building issues).
- k) Provisional: arrangement and attendance of 1No. 2hours Zoom meeting;
- l) CDM Principal Designer services as per CDM Regulations 2015.
- m) Prepare and submit Management and Maintenance plan.
- n) Complete works to RIBA stage 2. Prepare and submit concept design drawings for approval by the client and Historic England. Prepare and submit procurement strategy for approval by the client and Historic England. Prepare and coordinate advertisement for expressions of interest as per Public Procurement Regulations.
- o) Complete works to RIBA stage 3.
- p) Complete works to RIBA stage 4 including drawings, schedule of work and specification, including input from Structural Engineer, Archaeologist and Arboriculturalist (i.e. Tree maintenance and management operations to be included with the tender documents). Tender package to be submitted for approval by the client and Historic England prior to tendering. Obtain tenders and submit tender report with recommendations. All as per Public Procurement Regulations <https://historicengland.org.uk/services-skills/grants/procurement-regulations/advertising-seeking-tenders-building-works/>
- q) Provisional: 3No. lime mortar analyses by chemical dissolution.

The lead consultant should provide a resource schedule to provide costs as fixed lump sums (where possible) inclusive of expenses (see table below) but excluding VAT. They should also include for any further anticipated costs including identifying the activity and cost.

	Description	Cost
1.	Measured and drawn survey	
2.	Provisional: Digital survey	
3.	Review of information. Condition survey report/review of current QI with recommendations. On-site investigations and inspections	
4.1	Propping and shoring design	
4.2	Propping and shoring recommended budget cost	
5	Manage and coordinate sub-consultants, other consultants and contractors	
6	Structural Engineer/Conservation accredited Architect, Chartered Building Surveyor or Chartered Architectural Technologist – provide breakdown of services/costs	
7.1	Arboriculturalist – provide breakdown of services/costs	
7.2	Budget costs for vegetation removal/management if deemed necessary to complete the current phase of work	
8.	Budget costs for asbestos removal/management if deemed necessary to complete the current phase of work – None has been identified thus far.	
9.	Archaeologist – provide breakdown of services/costs	
10.	Provisional: 1No. 2hours Zoom meeting (Lead consultant only)	
11.	CDM Principal Designer services as per CDM Regulations 2015	
12.	Management and Maintenance Plan	
13.	Provisional: 3No. lime mortar analyses by chemical dissolution.	£600
	<b>TOTAL (excl. VAT)</b>	
		VAT
		<b>GRAND TOTAL</b>

#### 4. Development Work RIBA 1-4 (Phase 2) – please note Break Clause

The appointed lead consult and project team for Phase 1 will be required to complete RIBA stages 1-4 including the following tasks:

- r) Manage and coordinate sub-consultants, other appointed consultants and contractors. This to include assessing invoices, checking, approving and forwarding to the client for payment. Management of the overall phase 2 budget.
- s) Include for the appointment of a Structural Engineer / Conservation Accredited Architect, Chartered Building Surveyor or Chartered Architectural Technologist with relevant significant past experience in dealing with listed and historic buildings, to input where required on the project.
- t) Include for the appointment of an Arboriculturalist to advice on vegetation management/removal. Include estimated costs for removal/management of vegetation if necessary to complete the current phase of work.
- u) Include for the appointment of a specialist contractor to carry out investigations as per Structural Engineer’s specification.

- v) Include for the appointment of an Archaeologist to provide specialist advice including preparation of WSI and method statement for Phase 3. Provide estimated costs for a watching brief in preparation for the possible installation of new drains and soakaways. Provide day rates and estimated total costs.
- w) Arrangement and attendance of Zoom and or site meetings where needed.
- x) CDM Principal Designer services as per CDM Regulations 2015.

The lead consultant should provide a resource schedule to provide costs as fixed lump sums (where possible) inclusive of expenses (see table below) but excluding VAT. They should also include for any further anticipated costs including identifying the activity and cost.

	Description	Cost
14.	Manage and coordinate sub-consultants, other consultants and contractors	
15.	Structural Engineer/Conservation accredited Architect, Chartered Building Surveyor or Chartered Architectural Technologist – provide breakdown of services/costs	
16.1	Arboriculturalist – provide breakdown of services/costs	
16.2	Budget costs vegetation removal/management if deemed necessary to enable phase 3 to be carried out.	
17.	Ecologist	
18.	Archaeologist – provide breakdown of services/costs WSI and method statement for ground investigations and phase 3	
19.	Provisional: 1No. 2hours Zoom meeting (Lead consultant only)	
20.	RIBA 2	
21.	RIBA 3	
22.	RIBA 4	
23.	CDM Principal Designer services as per CDM Regulations 2015	
	<b>TOTAL (excl. VAT)</b>	
	VAT	
	<b>GRAND TOTAL</b>	

#### 5. Construction Phase RIBA 5-7 (Phase 3) – please note **Break Clause**

Following completion of the above the intention will be for the appointed lead consultant and project team to continue their appointment through RIBA Stage 5 to 7 inclusive.

The services for the lead consultant for RIBA Stages 5 to 7 will include contract administration, cost control, managing sub-consultants, managing and delivering the project.

The fees should be expressed as a percentage for each discipline for the following anticipated completed contract costs and inclusive of expenses but excluding VAT.

Contract Cost	Lead Consultant	CDM Principal Designer
Up to £150,000.00		
£150,000.01 to £200,000.00		
£200,000.01 to £250,000.00		

The appointment should also include for the following roles within their own company or via an appropriate sub-consultants as:

- Archaeologist (MCifa accredited);
- Arboriculturalist (MarborA accredited);
- Ecologist;
- Any others as deemed necessary.

The lead consultant should provide with their submission: a breakdown of their fees and project team fees/services for RIBA Stages 5, through to 7 together with a schedule of personnel to be involved and their hourly / day rates. A separate section covering travel and disbursements and other incidental costs is also to be provided.

## 6. Assessment Process

Five Lead Professionals have been invited to tender. Each bid will be assessed **based on 60% quality / 40% price** with three preliminary pass/fail requirements.

**NOTE: 6.1, 6.2 and 6.3 are 'pass/fail' criteria:**

**6.1** Name of Conservation Accredited Lead Consultant (AABC, RIBA SCA; RICS Conservation-accredited Surveyor or member of Directory of Accredited Conservationists [CIAT]; Conservation accredited Structural Engineer [CARE]) who shall have day to day responsibility for delivering this project and other members of proposed team all of whom shall provide evidence of significant demonstrable experience of historic buildings projects.

**6.2** Confirm via production of a resourcing statement and proposed project delivery programme that the Lead Consultant and their Team have demonstrable capacity to deliver the project in accordance with the overall timetable, which is:

- Phase 1 and 2 **January 2021-January 2022**; Phase 3 TBC (Jan 22 – 23).

**6.3** Insurances.

**6.4 QUALITY requirements [60%]:** *20% relevant experience, 20% methodology, 10% programme and 10% project team experience.*

**6.4 PRICE requirements [40%]:**

Calculations will be based on total price phase 1 + 2, Phase 3 (RIBA 5-7) for contract sum of £205,000 (this is an assumption for tender evaluation purpose only).

## 7. Break Clause

Please note that the client is under no obligation to commission works beyond Phase 2. The client does not bind itself to accept the lowest or any quote. The client reserves the right to accept parts of the quote. The quote and contract are dependent on receipt of the Historic England Heritage at Risk development grant and any subsequent grants for match funding.

## **8. Intellectual Property Rights**

All intellectual property rights in all Data or any other materials prepared or developed by the Supplier under or in connection with the Contract are hereby assigned to and shall vest in the client free from any encumbrance and with full title guarantee.

## **9. The client for this project and for any immediate queries is:**

The Norwich Historic Churches Trust Ltd

FAO Mark Wilson – Surveyor of the Fabric

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