



WINTERBOURNE MEDIEVAL BARN
HLF Bid Reference HG-15 - 04570
Supporting Information
WMB9 – Briefs for Consultants



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9.1 Briefs for Appointment of Staff (Development Phase)

Project Manager

The Brief covers an 18 month contract.

SGC wish to appoint an appropriately qualified Project Manager to administer the refurbishment of the Winterbourne Medieval Barn project through its HLF Development grant phase to create a comprehensively secure and deliverable project for submission to HLF at the second round Delivery grant stage. A Project board will be formed, chaired by SGC, with WMBT Trust representatives to oversee and monitor the project.

The Project

SGC have been fortunate in securing a Stage 1 development grant of £235,600 from the Heritage Lottery Fund and now wishes to develop detailed proposals for refurbishment of the complex. Running alongside this refurbishment project will be a programme of engagement and participation, utilising a range of activities from public consultation to schools programmes and events.

As a consequence SGC plan to appoint a Project Manager to work with the Project Board to lead and administer the Project.

The Brief

The Project Manager (PM) will be the principal point of contact between the Project Board and the appointed specialist consultants, capital works and other service providers.

This appointment will be made on a freelance contract basis and is envisaged to entail 25 -30 hours per week average through the project, with heavier involvement at key stages.

The PM is required to advise and support the Project Board on all aspects of its development of a project brief, design development, funding and project delivery necessary for the submission of a second round HLF application following the receipt of a first round development grant.

Submission of the second round application is provisionally targeted for October 2017.

The scope of service required is set out below:

Development Phase (to Part 2 submission)

- Organise and attend client/team meetings as required and provide expert advice as required
- Monitoring and reporting on project progress to the client at appropriate meetings and using appropriate methods

- Support the client in undertaking stakeholder and funding partner consultations
- Support the client in the appointment of consultants by competitive tender to undertake the following studies and commissions: Conservation Architects for refurbishment; CDM Co-ordinator; Ecology /Biodiversity; Heritage Marketing and Interpretation.
- Support the client with the oversight and co-ordination of the work of the above listed consultants in the preparation of the reports required to meet HLF requirements ie Activity Plans, Management and Maintenance Plans.
- Review the performance and outputs of consultants and service providers and make recommendations to the client in respect of interim fee payments
- Ensure Health and Safety issues are adequately assessed and managed
- The preparation of outline proposals with accompanying costs
- Establish, manage and administer Project Team meetings
- Development of a detailed and financially sustainable Business Plan
- Establish and maintain a detailed Risk Log and advise the Project Board on an appropriate frequency of all risks and appropriate mitigation measures.
- Prepare HLF monitoring reports as required
- Co-ordinate the preparation of the Second Round application to HLF
- Assist with queries from HLF arising during the Second Round assessment process.

General

The appointee shall perform the service under the terms of the agreement, with a high standard of skill, care and diligence as practiced by professional persons and consulting firms performing services of a similar nature. In addition, and having due regard to the client's commitment to deliver and operate a high quality heritage project, the appointee shall give particular attention to, and is required to achieve, a high standard of quality in every aspect of the consultancy service.

Project Timescales – Development Phase

The work should be carried out between July 2016 and October 2017, with the second phase application submitted to HLF by October 2017.

Tender Requirements

SGC requires all applicants to submit a proposal to carry out this project that covers the following:

- Demonstrable experience of ability to manage complex projects from inception to completion on time, on budget and to a high standard.

- Ability to work with and co-ordinate multi-disciplinary professional teams for project development and delivery.
- Familiarity with historic sites and buildings legislation and administration and appropriate qualifications
- Experience of consultancy contract specification and all types of procurement, with specific reference to HLF experience.
- Lump sum tender for the work, time charges and rates for disbursements
- General company or personal information including evidence of satisfactory public liability and professional indemnity insurance, both to a minimum value of £1 million.

Tender and performance evaluation:

Tenders will be assessed on the basis of

Price/resources/ value for money

Relevant experience/quality

Understanding of the commission and assessment of the key issues.

Performance and achievement reviews at project milestones

An interview will form part of the tender assessment and performance/achievement assessment.

Budget

We estimate the budget for this work would be in the range £40,000 to £50,000, including all expenses and travel disbursements. All prices to be quoted exclusive of VAT.

9.2 Briefs for Consultants (Development Phase)

The detailed design and development will be undertaken by appropriate consultants as listed below. The key improvements required are:

- Minor works within the Main Barn to ensure that it can support the proposed activities
- Restoration of the West Barn to provide a facility for lectures and demonstrations
- Rebuilding of the North Lean-to to provide administration and toilet facilities
- Rebuilding of the South Lean-to to provide catering facilities
- Other site works including provision of displays and interpretation
- Development of Activities post refurbishment
- Market and Audience Research to inform and validate the Business Plan and Activity Development

As a consequence SGC plan to appoint consultants with the following skill sets to draw up the plans and schemes for the various works and prepare tender documentation and advise the Project Board.

| Consultant | Role/Scope of Works |
|---|--|
| Conservation Architect(s) | To lead the design team for the work |
| Construction (Design and Management) Co-ordinator | To co-ordinate Construction (Design and Management) regulations |
| Structural Engineers | To work as part of design team led by Architects |
| Services Engineer | To work as part of design team led by Architects |
| Quantity Surveyor | To work as part of design team led by Architects |
| Ecologist | To complete study of ecological implications of proposed development |
| Highways Consultant | To work as part of design team led by Architects |
| Measured Survey Consultant | To work as part of design team led by Architects |
| Market and Audience Researcher | To lead research into potential market for refurbished facilities |
| Activity Development Consultant | To lead development of the Activity Plan |
| Interpretation Consultant | To develop proposal for Interpretation arrangements |
| Funding Consultant | To support acquisition of match funding |

Full details of the requirements / specifications are set out in each of the briefs below.

Project Timescales

The work should be carried out between October 2016 and May 2017, for submission of the second phase application to HLF by October 2017

Tender Requirements

In order to control costs consultants are invited to submit a fixed price for the works specified and additionally an hourly rate for any out of scope works. Consultants are invited to provide advice from their experience on the requirements/specifications listed in terms of any items omitted or unnecessary.

In addition all consultants must provide at least two reference sites and contact details for the purpose of obtaining appropriate references. Experience of working on HLF or EH projects would be advantageous.

Conservation Architects

SGC wishes to appoint an appropriately qualified architect to produce detailed design proposals for:

- Refurbishment of the Main Barn to ensure that it can support the proposed activities specified to RIBA stage D.
- Restoration of the West Barn to provide a facility for lectures and demonstrations specified to RIBA stage D
- Rebuilding the North Lean-to to provide administrative and toilet facilities specified to RIBA Stage D
- Rebuilding the South Lean-to to provide catering facilities specified to RIBA Stage D
- The successful tenderer must also discharge all statutory obligations for the designer in accordance with the provisions of the CDM Regulations and will provide all information necessary to support applications for all Statutory Planning and Building Regulation approvals.
- The contract will also cover the provision of detailed costings for the proposed work, to be provided by Quantity Surveyors managed by the successful tenderer
- The successful tenderer will be responsible for appointing and managing appropriate supporting consultants, including Building Services and Structural Engineers

It is anticipated that the budget for the Development element of the project will be in the region of £38 (excl VAT), plus additional costs for supporting consultants.

The following tender documentation is required:

- Evidence of design and execution of cohesive development proposals for sites and buildings of significant historic and architectural significance.
- Lump sum tender for the work (including a list of personnel to be involved and their qualifications (which should include Accreditation in Building Conservation), time charges and rates for disbursements.
- Evidence of ability to work within and as Lead Consultant for a multi-disciplinary team reporting to a Project Board via a Project Manager appointed by them.
- General company information (including evidence of satisfactory public liability cover to a minimum value of £10m, and professional indemnity insurance to a minimum value of £5m.

(vi) **Tender evaluation:** Tenders will be assessed on a quality:price ratio of 70:30 for which an interview will be part of the assessment.

(vii) **Project Management:**

The site is owned and administered by South Gloucestershire Council. The contract for this work will be between the Council and the successful tenderer in accordance with the terms of the RIBA Conditions of Appointment.

Draft Brief for Construction (Design and Management) Consultants (Development Phase)

SGC wish to appoint an appropriately qualified CDM Co-ordinator for the refurbishment of the Winterbourne Medieval Barn. The principal responsibilities will be to:

Development Phase

- Co-ordinate health and safety aspects of design work and co-operate with others involved with the project;
- Liaise with the principal contractor regarding ongoing design work
- Identify, collect and pass on pre-construction information; and

The successful tenderer must discharge all statutory obligations in accordance with the provisions of the CDM Regulations on behalf of the Client, will liaise with all Designers and report to the Client through the Project Manager.

It is anticipated that the project budget will be in the region of £1K (excl VAT).

The following tender documentation is required:

- Evidence of previous experience of providing advice to Client and Designers on construction health and safety risk management matters for construction and development projects for sites of significant historic and architectural significance.
- Proposals for early involvement with client body via a Project Manager, and designers to consider methodology in design and construction for reducing risks to workers during construction and to contractors and end users who work in or on the site and structures after completion.
- Evidence of working alongside a multi-disciplinary design team.
- General company information (including evidence of satisfactory public liability cover to a minimum value of £10m, and professional indemnity insurance to a minimum value of £5m.

Tender evaluation:

Tenders will be assessed on a quality:price ratio of 70:30 for which an interview will be part of the assessment.

Project Management:

The site is owned and administered by SGC. The contract for this work will be between SGC and the successful tenderer.

Measured Survey Consultant

SGC wish to appoint an appropriately qualified Consultant to complete a Measured Survey for the refurbishment of the Winterbourne Medieval Barn Complex. The principal responsibilities will be to:

- Topography Survey
- Ground Drainage Percolation Testing
- Mortar and Render analysis

It is anticipated that the project budget will be in the region of £3K (excl VAT). (v)

The following tender documentation is required:

- Evidence of previous experience of working on sites of significant historic and architectural significance.
- Evidence of working alongside a multi-disciplinary design team.
- General company information (including evidence of satisfactory public liability cover to a minimum value of £10m, and professional indemnity insurance to a minimum value of £5m.

Tender evaluation:

Tenders will be assessed on a quality:price ratio of 70:30 for which an interview will be part of the assessment.

Project Management:

The site is owned and administered by SGC. The contract for this work will be between SGC and the successful tenderer.

Ecology/Biodiversity Study Consultant

SGC wish to appoint an appropriately qualified Ecologist for the refurbishment of the Winterbourne Medieval Barn project. The principal responsibilities will be to inspect the property and site to ensure that there are no protected species.

It is anticipated that the project budget will be in the region of £2K (excl VAT). (v)

The following tender documentation is required:

- Evidence of previous experience of providing advice for sites of significant historic and architectural significance.
- Evidence of working alongside a multi-disciplinary design team.

- General company information (including evidence of satisfactory public liability cover to a minimum value of £10m, and professional indemnity insurance to a minimum value of £5m.

Tender evaluation:

Tenders will be assessed on a quality:price ratio of 70:30 for which an interview will be part of the assessment.

Project Management:

The site is owned and administered by SGC. The contract for this work will be between SGC and the successful tenderer.

Market and Audience Research Consultant

SGC wish to appoint an expert consultant(s) to carry out research into the potential for an increased activities to be carried out at Winterbourne Medieval Barn following its proposed refurbishment. The research should cover a number of specific areas:

- Opportunities to for increased educational activities
- Opportunities to give more visitors the chance to learn about the Barn and its heritage
- Opportunities for income generating events and activities to support the aim of economic self-sufficiency for the complex

The outcome of the research will help to demonstrate that the Business Plan is achievable, and provide information on the potential market following refurbishment.

The Winterbourne Medieval Barn Trust has a number of Trustees and Volunteers with considerable local knowledge and it is anticipated that the successful tenderer will work with the Trust to optimise the information provided.

The Project

SGC have been fortunate in securing a Part 1 Development grant) from the Heritage Lottery Fund and wishes to refurbish/renovate the main Barn and out buildings in the curtilage to their former glory and provide flexible spaces for a variety of commercial, community and educational uses. The primary aim is extend the range of opportunities for people to engage with the heritage and to support the trust in becoming economically self-sufficient in order to secure the long term future for the complex.

The Brief

A number of opportunities have been identified and incorporated in the current Business Plan. However there is a need to carry out research to confirm that these are feasible and identify any other opportunities. The tenderer should also provide guidance on marketing the complex following refurbishment.

The research should cover as a minimum

- Interest in the complex from schools and colleges as an educational heritage site
- Interest in the complex from other visitors eg Architecture/history groups
- Interest in the complex as a conference/meeting facility
- Interest in the complex for the provision and delivery of courses on rural crafts

The research should identify the potential nature and size of each potential market, and identify any special interests

The guidance on marketing should cover the most effective means of reaching specific audiences, including

Young people

Hard to reach groups

Communities interested in participation in cultural activities

Potential volunteers

Those from all groups interested in new learning opportunities

Potential partner organisations among community, education and other groups

Reporting

The Consultant will report to the Project Manager and will submit regular reports and attend meetings as required.

Project Timescales

The work should be carried out between August 2016 and September 2017 with the final plan submitted for approval by September 2017.

Tender Requirements

SGC requires all those invited to quote to submit a proposal to carry out this project that covers the following:

- Project methodology and programme – short, succinct and practical in nature
- Outline of the project team resources (including CV(s)) and individuals roles within it project fees including expenses (consultants are asked to clearly identify the number of days included within the bid and the applicable day rates for each member of the team) two references are required

The tender should be provided in two complete hard copies and 1 full electronic version (on disk).

Tender Evaluation

- Tenders will be assessed on the basis of

- Price/resources/ value for money
- Relevant experience/quality
- Understanding of the commission/methodology and assessment of the key issues.
- An interview will form part of the assessment

Budget

Given the tasks outlined above, we estimate that the budget for this piece of work should be in the range £15,000, including all expenses, all travel, venue hires for meetings, hospitality for meetings etc (the latter should be clearly specified). All prices to be quoted exclusive of VAT.

Interpretation (Development Phase)

SGC wish to appoint an expert consultant(s) to carry out the research and development necessary to produce a detailed Interpretation Strategy for the Winterbourne Medieval Barn Refurbishment project for submission to HLF to support the second round delivery grant stage.

The Project

SGC have been fortunate in securing a Stage 1 development grant from the Heritage Lottery Fund for the refurbishment of the Winterbourne Medieval Barn complex. The refurbished buildings will incorporate improved interpretation to meet the needs of new audiences, and to enable them to learn about the heritage.

The Brief

The Part 2 HLF Submission needs to incorporate detailed proposals for interpretation to be incorporated into the Implementation stage. The proposals need to take account of the proposed utilisation of the refurbished complex, and the potential audiences it will attract. They should also comply with the HLF Interpretation Good Practice Guidance.

The project includes provision for a Market Research study to confirm the potential audience and activities to be carried out, as well as development of a detailed Activity Plan and the Interpretation proposals need to be consistent with the results from these exercises. In addition there is considerable knowledge about the history and architecture of the complex available from existing Trustees and previous studies.

The tender document will cover design and costings of appropriate interpretation material for implementation as part of Part 2. It needs to take account of:

- The availability of existing architectural and historical information
- The anticipated uses for the refurbished complex
- The anticipated visitor profile
- The need for sustainable, cost effective interpretation for the future

Before starting, the Consultant must ensure that he/she is fully aware of the latest requirements of the HLF and be well-versed in the relevant guidelines for this work. Experience of preparing Interpretation plans in the Heritage Sector is, therefore, essential. The final plan should include as a minimum:

- Identify and develop appropriate interpretation themes for the site
- Provision of advice on appropriate website and social media development
- A detailed costed proposal for inclusion in the Part 2 HLF Submission
- Provision of advice on the development of a simple evaluation strategy and feed-back facilities to obtain ongoing information from visitors/groups etc .

Output

Produce a detailed Interpretation Plan, for delivery (in accordance with HLF Guidelines) for submission with the Second Round Funding Application.

The successful Consultant will be required to work with the Project Manager, the Design team and Market Research Consultant to ensure consistency in the overall learning aims of activities and interpretation centre material.

Reporting

The Consultant will report to the Project Manager and will submit regular reports and attend meetings as required.

Project Timescales

The work should be carried out between August 2016 and August 2017 with the final plan submitted by September 2017.

Tender Requirements

SGC requires all those invited to quote to submit a proposal to carry out this project that covers the following:

- project methodology and programme – short, succinct and practical in nature
- outline of the project team resources (including CV(s)) and individuals roles within it project fees including expenses (consultants are asked to clearly identify the number of days included within the bid and the applicable day rates for each member of the team)
- two references are required

The tender should be provided in two complete hard copies and 1 full electronic version (on disk).

Tender Evaluation

Tenders will be assessed on the basis of

Price/resources/ value for money

Relevant experience/quality

Understanding of the commission/methodology and assessment of the key issues.

An interview will form part of the assessment

Activity Plan Development and Implementation (Development Phase)

SGC wish to appoint an expert consultant(s) to develop a detailed Activity Plan to support the second round delivery grant stage.

The Project

SGC have been fortunate in securing a Part 1 development grant from the Heritage Lottery Fund for the refurbishment of the Winterbourne Medieval Barn complex. The refurbished buildings will incorporate improved interpretation to meet the needs of new audiences, and to enable them to learn about the heritage.

The Brief

The Part 2 HLF Submission needs to incorporate detailed proposals for development of activities following refurbishment to be implemented following capital refurbishment.

The project includes provision for a Market Research study to confirm the potential audience and activities to be carried out. In addition a number of surveys have been completed to identify potential opportunities, and other sources of information are available. The refurbishment proposals should result in a significant increase in the range and number of activities and there is a requirement for a detailed plan to ensure that the Trust can get maximum advantage from the available opportunities

Before starting, the Consultant must ensure that he/she is fully aware of the latest requirements of the HLF and be well-versed in the relevant guidelines for this work.

The consultant will work with Trustees and Volunteers to draw on the experience available.

On the assumption that the Part 2 Submission is successful, a further appointment will be made for resources to implement the plan. This will be subject to a separate tender exercise

Output

Produce a detailed Activity Plan (in accordance with HLF Guidelines) for submission with the Second Round Funding Application.

Reporting

The Consultant will report to the Project Manager and will submit regular reports and attend meetings as required.

Project Timescales

The work should be carried out between August 2016 and August 2017 with the final plan submitted by September 2017.

Tender Requirements

SGC requires all those invited to quote to submit a proposal to carry out this project that covers the following:

- project methodology and programme – short, succinct and practical in nature
 - outline of the project team resources (including CV(s)) and individuals roles within it
 - project fees including expenses (consultants are asked to clearly identify the number of days included within the bid and the applicable day rates for each member of the team)
- two references are required

The tender should be provided in two complete hard copies and 1 full electronic version (on disk).

Tender Evaluation

Tenders will be assessed on the basis of

Price/resources/ value for money

Relevant experience/quality

Understanding of the commission/methodology and assessment of the key issues.

An interview will form part of the assessment

Funding Plan Development and Implementation

SGC wish to appoint an expert consultant(s) to develop and co-ordinate a detailed Funding Plan to support the second round delivery grant stage.

The Project

SGC have been fortunate in securing a Part 1 development grant from the Heritage Lottery Fund for the refurbishment of the Winterbourne Medieval Barn complex. The refurbished buildings will incorporate improved interpretation to meet the needs of new audiences, and to enable them to learn about the heritage.

The Brief

The Development phase of the project needs to identify and confirm additional funding of £400K in addition to the HLF grant and funds from South Gloucestershire Council. An initial list of potential funders has been produced. Key activities will be to progress applications to potential funders as well as identifying other available sources. The work will be done in conjunction with Trustees of Winterbourne Medieval Barn Trust

Before starting, the Consultant must ensure that he/she is fully aware of the latest requirements of the HLF and be well-versed in the relevant guidelines for this work.

The consultant will work with Trustees and Volunteers to draw on the experience available.

Output

Produce a detailed Funding Plan and co-ordinate the applications to funders as well other fund raising activities.

Reporting

The Consultant will report to the Project Manager and will submit regular reports and attend meetings as required.

Project Timescales

The work should be carried out between July 2016 and September 2017.

Tender Requirements

SGC requires all those invited to quote to submit a proposal to carry out this project that covers the following:

- project methodology and programme – short, succinct and practical in nature
- outline of the project team resources (including CV(s)) and individuals roles within it
- project fees including expenses (consultants are asked to clearly identify the number of days included within the bid and the applicable day rates for each member of the team)
- two references are required

The tender should be provided in two complete hard copies and 1 full electronic version (on disk).

Tender Evaluation

Tenders will be assessed on the basis of

Price/resources/ value for money

Relevant experience/quality

Understanding of the commission/methodology and assessment of the key issues.

An interview will form part of the assessment

The total costs of the Development Phase (excluding volunteer time) including supporting contractors to be managed by the Architect and Contingency is anticipated to be £200,600.

Delivery Phase (post Round 2 award to project completion)

9.3 Outline Briefs for Appointment of Staff (Delivery Phase)

Project Manager

The Brief covers an 18 month contract.

SGC wish to appoint an appropriately qualified Project Manager to administer the refurbishment of the Winterbourne Medieval Barn project.

The Brief

The Project Manager (PM) will be the principal point of contact between the Project Board and the appointed specialist consultants, capital works and other service providers.

This appointment will be made on a freelance contract basis and is envisaged to entail 25 -30 hours per week average through the project, with heavier involvement at key stages.

The PM is required to advise and support the Project Board on all aspects of delivery of the overall project

The scope of service required is set out below:

- Oversee the implementation of the physical works to practical completion on time / budget / quality.
- Update the project delivery programme
- Co-ordinate drawing up of tender shortlists and lead pre-qualification enquiries in relation of potential contractors
- Arrange for tender documentation to be prepared and distributed
- Organise and control project control systems - Monitor costs and expenditure.
- Organise and chair progress meetings, risk management reviews, attend design team meetings and meetings with the client as required.
- Oversee the implementation of the Interpretation Plan
- Prepare project evaluation systems to feed into final report
- Assist the board with the preparation of a project opening / launch.

General

The appointee shall perform the service under the terms of the agreement, with a high standard of skill, care and diligence as practiced by professional persons and consulting firms performing services of a similar nature. In addition, and having due regard to the client's commitment to deliver and operate a high quality heritage project, the appointee shall give particular attention to, and is required to achieve, a high standard of quality in every aspect of the consultancy service.

Project Timescales – Development Phase

The work should be carried out between April 2018 and September 2019.

Tender Requirements

The Trust requires all applicants to submit a proposal to carry out this project that covers the following:

- Demonstrable experience of ability to manage complex projects from inception to completion on time, on budget and to a high standard.
- Ability to work with and co-ordinate multi-disciplinary professional teams for project development and delivery.
- Familiarity with historic sites and buildings legislation and administration and appropriate qualifications
- Experience of consultancy contract specification and all types of procurement, with specific reference to HLF experience.
- Lump sum tender for the work, time charges and rates for disbursements
- General company or personal information including evidence of satisfactory public liability and professional indemnity insurance, both to a minimum value of £1 million.

Tender and performance evaluation:

Tenders will be assessed on the basis of

Price/resources/ value for money

Relevant experience/quality

Understanding of the commission and assessment of the key issues.

Performance and achievement reviews at project milestones

An interview will form part of the tender assessment and performance/achievement assessment.

Budget

We estimate the budget for this work would be in the range £40,000 to £50,000, including all expenses and travel disbursements. All prices to be quoted exclusive of VAT.

9.4 Briefs for Consultants (Delivery Phase)

SGC plan to appoint consultants with the following skill sets to deliver the project.

| Consultant | Role/Scope of Works |
|---|---|
| Conservation Architect(s) | To lead the design team for the work |
| Construction (Design and Management) Co-ordinator | To co-ordinate Construction (Design and Management) regulations |
| Structural Engineers | To work as part of design team led by Architects |
| Building Services Engineer | To work as part of design team led by Architects |
| Quantity Surveyor | To work as part of design team led by Architects |
| Highways Consultant | To work as part of design team led by Architects |
| Activity Development Consultant | To implement Activity Plan produced during Development Phase |
| Interpretation Consultant | To Implement proposal for Interpretation arrangements |

Full details of the requirements / specifications are set out in each of the briefs below.

Project Timescales

The work should be carried out between October 2018 and September 2019

Tender Requirements

In order to control costs consultants are invited to submit a fixed price for the works specified and additionally an hourly rate for any out of scope works. Consultants are invited to provide advice from their experience on the requirements/specifications listed in terms of any items omitted or unnecessary.

In addition all consultants must provide at least two reference sites and contact details for the purpose of obtaining appropriate references. Experience of working on HLF or EH projects would be advantageous.

Conservation Architects

SGC wishes to appoint an appropriately qualified architect to produce manage:

- Refurbishment of the Main Barn to ensure that it can support the proposed activities specified to RIBA stage D.
- Restoration of the West Barn to provide a facility for lectures and demonstrations specified to RIBA stage D
- Rebuilding the North Lean-to to provide administrative and toilet facilities specified to RIBA Stage D
- Rebuilding the South Lean-to to provide catering facilities specified to RIBA Stage D
- The successful tenderer must also discharge all statutory obligations for the designer in accordance with the provisions of the CDM Regulations and will provide all information necessary to support applications for all Statutory Planning and Building Regulation approvals.
- The contract will also cover the provision of detailed costings for the proposed work, to be provided by Quantity Surveyors managed by the successful tenderer
- The successful tenderer will be responsible for appointing and managing appropriate supporting consultants, including Building Services and Structural Engineers

It is anticipated that the budget for the Delivery element of the project will be in the region of £55K (excl VAT) plus additional sums for supporting consultants

The following tender documentation is required:

- Evidence of design and execution of cohesive development proposals for sites and buildings of significant historic and architectural significance.
- Lump sum tender for the work (including a list of personnel to be involved and their qualifications (which should include Accreditation in Building Conservation), time charges and rates for disbursements.
- Evidence of ability to work within and as Lead Consultant for a multi-disciplinary team reporting to Trustees via a Project Manager appointed by them.
- General company information (including evidence of satisfactory public liability cover to a minimum value of £10m, and professional indemnity insurance to a minimum value of £5m.

(viii) **Tender evaluation:** Tenders will be assessed on a quality:price ratio of 70:30 for which an interview will be part of the assessment.

(ix) Project Management:

The site is owned and administered by South Gloucestershire Council. The contract for this work will be between the Council and the successful tenderer in accordance with the terms of the RIBA Conditions of Appointment.

Draft Brief for Construction (Design and Management) Consultants (Development Phase)

SGC wish to appoint an appropriately qualified CDM Co-ordinator for the refurbishment of the Winterbourne Medieval Barn. The principal responsibilities will be to:

Implementation Phase

- Advise and assist the client with their duties;
- Facilitate good communication between the client, designers and contractors;
- Liaise with the principal contractor regarding ongoing design work;
- Facilitate good communication between the client, designers and contractors;
- Liaise with the principal contractor regarding ongoing design work;
- Prepare/update the health and safety file.

The successful tenderer must discharge all statutory obligations in accordance with the provisions of the CDM Regulations on behalf of the Client, will liaise with all Designers and report to the Client through the Project Manager.

It is anticipated that the project budget will be in the region of £2K (excl VAT).

The following tender documentation is required:

- Evidence of previous experience of providing advice to Client and Designers on construction health and safety risk management matters for construction and development projects for sites of significant historic and architectural significance.
- Proposals for early involvement with client body via a Project Manager, and designers to consider methodology in design and construction for reducing risks to workers during construction and to contractors and end users who work in or on the site and structures after completion.
- Evidence of working alongside a multi-disciplinary design team.
- General company information (including evidence of satisfactory public liability cover to a minimum value of £10m, and professional indemnity insurance to a minimum value of £5m).

Tender evaluation:

Tenders will be assessed on a quality:price ratio of 70:30 for which an interview will be part of the assessment.

Project Management:

The site is owned and administered by SGC. The contract for this work will be between SGC and the successful tenderer.

Interpretation (Delivery Phase)

SGC wish to appoint an expert consultant(s) to implement the detailed Interpretation Strategy for the Winterbourne Medieval Barn Refurbishment project

The Project

SGC have been fortunate in securing a Stage 1 development grant from the Heritage Lottery Fund for the refurbishment of the Winterbourne Medieval Barn complex. The refurbished buildings will incorporate improved interpretation to meet the needs of new audiences, and to enable them to learn about the heritage.

The Brief

The Development phase will have produced an agreed Interpretation Plan and the brief is to implement the proposals contained in it

The successful Consultant will be required to work with the Project Manager, and the Design team to ensure consistency in the overall learning aims of activities and interpretation centre material.

Reporting

The Consultant will report to the Project Manager and will submit regular reports and attend meetings as required.

Project Timescales

The work should be carried out between October 2018 and September 2019.

Tender Requirements

SGC requires all those invited to quote to submit a proposal to carry out this project that covers the following:

- project methodology and programme – short, succinct and practical in nature
- outline of the project team resources (including CV(s)) and individuals roles within it
- project fees including expenses (consultants are asked to clearly identify the number of days included within the bid and the applicable day rates for each member of the team)
- two references are required

The tender should be provided in two complete hard copies and 1 full electronic version (on disk).

Tender Evaluation

Tenders will be assessed on the basis of

Price/resources/ value for money

Relevant experience/quality

Understanding of the commission/methodology and assessment of the key issues.

An interview will form part of the assessment

Activity Plan Development and Implementation (Development Phase)

SGC wish to appoint an expert consultant(s) to implement the detailed Activity Plan

The Brief

The Development Phase will have produced a detailed Activity Plan to develop appropriate activities post refurbishment. The brief is to implement the plan to ensure that anticipated project outcomes can be achieved .

The consultant will work with Trustees and Volunteers to draw on the experience available.

Reporting

The Consultant will report to the Project Manager and WMBT (post completion of refurbishment) and will submit regular reports and attend meetings as required.

Project Timescales

The work should be carried out between March 2019 and March 2021

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