

**UK-London: project-management services other than for construction work**

OJ S 53/2012 16/03/2012

Contract notice

Services

**Directive 2004/18/EC****Section I: Contracting authority**

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**I.1. Name and addresses**

Official name: National Heritage Memorial Fund

Postal address: 7 Holbein Place,

Town: London

Postal code: SW1W 8NR

Country: United Kingdom

Contact person: Strategic Business Development Team

For the attention of: Yumna Zain

E-mail: [ross2013mentor@hlf.org.uk](mailto:ross2013mentor@hlf.org.uk)

Telephone: +44 2075916023

**Internet address(es):**General address of the contracting authority: [www.hlf.org.uk](http://www.hlf.org.uk)**Additional information can be obtained from:**

the abovementioned address

**Specifications and additional documents (including documents for competitive dialogue and a dynamic purchasing system) can be obtained from:**

the abovementioned address

**Tenders or requests to participate must be submitted:** the abovementioned address**I.2. Type of the contracting authority**

Body governed by public law

**I.3. Main activity**

Recreation, culture and religion

Other: Lottery money distributor for heritage and cultural projects

**I.4. Contract award on behalf of other contracting authorities**

The contracting authority is purchasing on behalf of other contracting authorities: no

**Section II: Object of the contract**

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**II.1. Description****II.1.1. Title attributed to the contract by the contracting authority**

National Heritage Memorial Fund - Register of Support Services 2013 - Heritage &amp; Digital Specialists.

**II.1.2. Type of contract and place of performance or delivery**

Services

Service category No 27: Other services

Main site or place of performance: United Kingdom.

NUTS code UK United Kingdom

### **II.1.3. Information about a framework agreement or a dynamic purchasing system**

The procurement involves the establishment of a framework agreement

### **II.1.4. Information about framework agreement**

Framework agreement with a single operator

#### **Duration of the framework agreement**

Duration in months: 36

In the case of framework agreements, provide justification for any duration exceeding 4 years:

It is anticipated that the contract will be for an initial period of 36 months with options for the Contracting Authority to extend it for further periods of up to (in aggregate) 24 months.

#### **Estimated total value of purchases for the entire duration of the framework agreement**

Estimated value excluding VAT:

Range: between 600 000 and 1 000 000 GBP

### **II.1.5. Short description of the contract or purchase(s)**

Background to HLF.

The Heritage Lottery Fund (HLF) distributes a share of funds raised by the National Lottery. Since 1994 we have awarded 4 700 000 000 GBP to 32 000 projects across the UK, ranging from major capital projects at iconic heritage sites to small education and community projects. HLF is administered by the Trustees of the National Heritage Memorial Fund (NHMF) and gives grants to support a wide range of projects involving the local, regional and national heritage of the United Kingdom.

We distribute money raised to projects conserving our diverse heritage and helping people learn about and take an active part in it. Our definition of heritage is broad, including: historic buildings and townscapes; archaeological sites; museums and archives; natural and designed landscapes (including parks habitats and species) oral history, cultural traditions and local community heritage.

Information about HLF is at [www.hlf.org.uk](http://www.hlf.org.uk).

We require Mentors with appropriate specialist knowledge, skills and experience who are available to support projects across the whole of the UK. The mentor role on any individual project will be defined at the time of commissioning and may be at any one of three stages of our grant making process:

1. Mentoring organisations who have received a 'first round pass' to develop their project towards their second round (full) application to us;
2. Supporting and mentoring successful delivery of the projects we fund
3. Mentors may also be asked to provide expert advice on applications for funding for projects that they have not previously worked with.

A single Mentor may be used in one or more of these stages so you must be able to demonstrate Mentoring skills and be an expert in your specialist area(s).

The categories of specialist knowledge, skills and experience are:

Heritage Areas.

- museums,
- libraries,
- archives,
- historic buildings,
- archaeology and monuments,
- parks and designed landscapes,
- countryside and landscape,
- biodiversity and geodiversity,
- industrial machinery,

- ships and other vessels,
- vehicles (road and rail),
- aircraft.

Activities 1.

- assessing significance,
- conservation,
- management and maintenance,
- recording/survey,
- new build,
- refurbishment/re-development,
- environmental sustainability including energy efficiency and greening,
- design/display.

Activities 2.

- learning and interpretation,
- training and vocational skills,
- audience development and participation (including young people) and cultural diversity,
- oral history,
- business planning / governance / capacity building,
- fundraising,
- project management of digital projects,
- web and interactive design,
- social media,
- creating, managing and delivering digital heritage assets,
- user engagement.

We would envisage at this stage that we will need between five and twenty Mentors per sector, and candidates will be expected to complete a skills matrix at the ITT stage.

We are also looking for specific professions, namely: Archaeologists; Architects; Conservators; Engineers; Project Managers; and Quantity Surveyors.

We also require heritage specialists who are fluent in Welsh (written and spoken) to operate as part of this register and deliver these services where the project requires them to be in Welsh or bi-lingual (Welsh and English).

Successful candidates will be included on our Register of Support Services.

NOTE: To register your interest in this notice and obtain any additional information please visit the myTenders Web Site at [http://www.myTenders.org/Search/Search\\_Switch.aspx?ID=85173](http://www.myTenders.org/Search/Search_Switch.aspx?ID=85173).

#### II.1.6. CPV code(s)

79421000 Project-management services other than for construction work, 79421100 Project-supervision services other than for construction work, 79418000 Procurement consultancy services, 79400000 Business and management consultancy and related services, 79410000 Business and management consultancy services, 79411000 General management consultancy services, 79411100 Business development consultancy services, 79415200 Design consultancy services, 79421200 Project-design services other than for construction work, 71000000 Architectural, construction, engineering and inspection services, 72000000 IT services: consulting, software development, Internet and support, 72920000 Computer catalogue conversion services, 79995000 Library management services, 79995100 Archiving services, 79995200 Cataloguing services, 92000000 Recreational, cultural and sporting services, 92111000 Motion picture and video production services, 92310000 Artistic and literary creation and interpretation services, 92500000 Library, archives, museums and other cultural services, 92510000 Library and archive services, 92511000 Library services,

92512000 Archive services, 92512100 Archive destruction services, 92520000 Museum services and preservation services of historical sites and buildings, 92521000 Museum services, 92521100 Museum-exhibition services, 92521200 Preservation services of exhibits and specimens, 92521210 Preservation services of exhibits, 92521220 Preservation services of specimens, 92522000 Preservation services of historical sites and buildings, 92522100 Preservation services of historical sites, 92522200 Preservation services of historical buildings , 92530000 Botanical and zoological garden services and nature reserve services, 92531000 Botanical garden services, 92532000 Zoological garden services, 92533000 Nature reserve services, 92534000 Wildlife preservation services, 45112711 Landscaping work for parks, 34500000 Ships and boats, 35500000 Warships and associated parts, 34512000 Ships and similar vessels for the transport of persons or goods, 34513000 Fishing, emergency and other special vessels, 37527000 Toy trains and vehicles, 34100000 Motor vehicles, 34910000 Horse or hand-drawn carts, other non-mechanically-propelled vehicles, baggage carts and miscellaneous spare parts, 34700000 Aircraft and spacecraft, 35600000 Military aircrafts, missiles and spacecrafts, 50200000 Repair, maintenance and associated services related to aircraft, railways, roads and marine equipment, 80420000 E-learning services, 80530000 Vocational training services, 72224000 Project management consultancy services, 71541000 Construction project management services, 79311000 Survey services

#### **II.1.7. Information about the Government Procurement Agreement (GPA)**

The procurement is covered by the Government Procurement Agreement: yes

#### **II.1.8. Lots**

This contract is divided into lots: no

#### **II.1.9. Information about variants**

Variants will be accepted: no

### **II.2. Scope of the procurement**

#### **II.2.1. Total quantity or scope**

Please refer to the Pre-Qualification Questionnaire on our website at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 Mentor Pre-Qualification Questionnaire". You should also read the "ROSS 2013 Tender alert email" also found in the "Tenders" section.

Estimated value excluding VAT:

Range: between 600 000 and 1 000 000 GBP

#### **II.2.2. Information about options**

Options: yes

Description of options: Extension of the contract from 36 to 60 months.

Provisional timetable for recourse to these options:  
in months: 36 (from the award of the contract)

#### **II.2.3. Information about renewals**

This contract is subject to renewal: yes

Number of possible renewals: Range: between 1 and 2

In the case of renewable supplies or service contracts, estimated timeframe for subsequent contracts:

in months: 36 (from the award of the contract)

### **II.3. Duration of the contract or time limit for completion**

Start 1.4.2013. Completion 31.3.2016

## Section III: Legal, economic, financial and technical information

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### III.1. Conditions related to the contract

#### III.1.1. Deposits and guarantees required

Details will be in the Invitation to Tender.

#### III.1.2. Main financing conditions and payment arrangements and/or reference to the relevant provisions governing them

As stated in the contract documentation.

#### III.1.3. Legal form to be taken by the group of economic operators to whom the contract is to be awarded

Please refer to the Pre-Qualification Questionnaire on our website at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 Mentor Pre-Qualification Questionnaire". You should also read the "ROSS 2013 Tender alert email" also found in the "Tenders" section.

#### III.1.4. Contract performance conditions

The performance of the contract is subject to particular conditions: no

### III.2. Conditions for participation

#### III.2.1. Suitability to pursue the professional activity, including requirements relating to enrolment on professional or trade registers

List and brief description of conditions: Please refer to the Pre-Qualification Questionnaire on our website at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 Mentor Pre-Qualification Questionnaire". You should also read the "ROSS 2013 Tender alert email" also found in the "Tenders" section.

Submission of the Pre-Qualification Questionnaire acts as a request to participate. The Contracting Authority reserves the right to refuse to consider any incomplete questionnaire or one that is not submitted according to the requirements of that questionnaire.

#### III.2.2. Economic and financial ability

List and brief description of conditions: Please refer to the Pre-Qualification Questionnaire on our website at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 Mentor Pre-Qualification Questionnaire". You should also read the "ROSS 2013 Tender alert email" also found in the "Tenders" section.

#### III.2.3. Technical and professional ability

List and brief description of conditions:

Please refer to the Pre-Qualification Questionnaire on our website at <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>. Look under the section titled "Tenders" for a document titled "ROSS 2013 Mentor Pre-Qualification Questionnaire". You should also read the "ROSS 2013 Tender alert email" also found in the "Tenders" section.

#### III.2.4. Information about reserved contracts

### III.3. Conditions specific to services contracts

#### III.3.1. Information about a particular profession

### **III.3.2. Information about staff responsible for the performance of the contract**

Obligation to indicate the names and professional qualifications of the staff assigned to performing the contract: yes

## **Section IV: Procedure**

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### **IV.1. Type of procedure**

#### **IV.1.1. Type of procedure**

Restricted

#### **IV.1.2. Information about the limits on the number of candidates to be invited**

Envisaged minimum number 5

Objective criteria for choosing the limited number of candidates: Sufficient required to allow for choice up to a maximum of those that pass our initial Pre-Qualification Questionnaire criteria. We are uncertain with respect to the numbers of projects; heritage sectors they fall under and risk.

#### **IV.1.3. Information about reduction of the number of solutions or tenders during negotiation or dialogue**

### **IV.2. Award criteria**

#### **IV.2.1. Award criteria**

The most economically advantageous tender in terms of Price is not the only award criterion and all criteria are stated only in the procurement documents

#### **IV.2.2. Information about electronic auction**

An electronic auction will be used: no

### **IV.3. Administrative information**

#### **IV.3.1. File reference number attributed by the contracting authority**

85173

#### **IV.3.2. Previous publication concerning this procedure**

#### **IV.3.3. Conditions for obtaining specifications and additional documents or descriptive document**

#### **IV.3.4. Time limit for receipt of tenders or requests to participate**

30.4.2012 - 10:00

#### **IV.3.5. Estimated date of dispatch of invitations to tender or to participate to selected candidates**

15.8.2012

#### **IV.3.6. Languages in which tenders or requests to participate may be submitted**

English.

Other: Welsh.

#### **IV.3.7. Minimum time frame during which the tenderer must maintain the tender**

#### **IV.3.8. Conditions for opening of tenders**

## Section VI: Complementary information

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### VI.1. Information about recurrence

### VI.2. Information about European Union funds

### VI.3. Additional information

Organisation: National Heritage Memorial Fund.

For the attention of: Yumna Zain.

Address: Heritage Lottery Fund, 7 Holbein Place.

Postal code: SW1W 8NR.

Town: London.

Country: United Kingdom.

Electronic mail (e-mail): [ross2013mentor@hlf.org.uk](mailto:ross2013mentor@hlf.org.uk).

Internet address: <http://www.hlf.org.uk/aboutus/FOI/Pages/Procurement.aspx>.

This procurement is independent of, and separate from, other procurements by the National Heritage Memorial Fund.

Frequently Asked Questions will periodically be published on the above website under the "Tender" section.

(MT Ref:85173).

### VI.4. Procedures for review

#### VI.4.1. Review body

#### VI.4.2. Review procedure

#### VI.4.3. Service from which information about the review procedure may be obtained

### VI.5. Date of dispatch of this notice

14.3.2012