

UK-Swindon: project and design preparation, estimation of costs

OJ S 88/2012 08/05/2012

Contract notice

Services

Directive 2004/18/EC

Section I: Contracting authority

I.1. Name and addresses

Official name: National Trust

Postal address: Heelis, Kemble Drive

Town: Swindon

Postal code: SN2 2NA

Country: United Kingdom

Contact person: Senior Project Manager

For the attention of: Richard Hill

E-mail: richard.hill@nationaltrust.org.uk

Telephone: +44 7808889553

Internet address(es):

General address of the contracting authority: <http://www.nationaltrust.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

Other: Registered Conservation Charity

I.3. Main activity

Recreation, culture and religion

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

II.1. Description

II.1.1. Title attributed to the contract by the contracting authority

Quantity surveying services (studio and restaurant) - "Inspired by Knole" Project.

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

Services

Service category No 12: Architectural services; engineering services and integrated engineering services; urban planning and landscape engineering services; related scientific and technical consulting services; technical testing and analysis services

Main site or place of performance: Knole, Sevenoaks, Kent, TN15 0RP.

NUTS code UKJ4 Kent

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

The notice involves a public contract

II.1.4. Information about framework agreement

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

The National Trust wishes to appoint a quantity surveying practice in connection with the design of "Knole Studios" - a conservation studio complex for the conservation and repair of the historic contents, including space for public engagement and training - and also for a re-design of the existing restaurant including an extension to increase capacity.

II.1.6. CPV code(s)

71242000 Project and design preparation, estimation of costs - FG25, 71244000 Calculation of costs, monitoring of costs - FG25, 71246000 Determining and listing of quantities in construction - FG25

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

The procurement is covered by the Government Procurement Agreement: no

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

The "Inspired by Knole" project focuses on Knole, in Sevenoaks, Kent. Knole is considered to be one of the great ducal palaces of England and its story spanning over 500 years also makes it one of the most extraordinary. Surrounded by a medieval deer park, Knole is vast in scale. Its remarkable complex of stone ranges around seven courts which, with its turrets and gables has been likened to a medieval town, covers an area of four acres. Though its size suggests long organic growth, it remains largely as it was by about 1610, Built by archbishops of Canterbury in the later 15th and early 16th century and dramatically recast by Thomas Sackville (1536-1608), 1st Earl of Dorset, in a few astonishing years from 1605 to 1608. The Sackville family has lived here ever since, with the National Trust accepting ownership and responsibility for its care in 1946. It is physically the largest private home in England and the only one of its scale to remain, as it was built, in an english vernacular tradition.

The "Inspired by Knole" project will deliver a transformative experience for visitors to one of the country's most important historic houses. It is driven by the Trust's objective of Bringing Places to Life, and addresses the strategic ambition of Improving Conservation and Environmental Performance.

Part of the project is the need to conserve the internationally important collections at Knole which, in turn, provides an opportunity to deliver this work in a new and engaging way through the creation of conservation studios. The medieval barn and hayloft are the areas identified for the new studio complex. Purpose-designed conservation studios and stores will enable us to conserve many of the objects in the collection on site and will be a place where the public can actively participate in our work, as well as learning about conservation techniques used in looking after the objects. Accessible storage will enable visitors to see objects in detail and under studio lighting and to learn about the process of understanding and recording that accompanies conservation practice. Arts studios and an exhibition space will provide room for

a variety of events such as conservator or artist-led seminars and workshops or for the use of community arts groups. The studios will also become the focal point for a crucial element of the project – skills development. The Studios will provide a constantly changing picture of our work at Knole and will guarantee that we have a high number of repeat visits.

In addition to the Knole Studios we plan to refurbish the existing restaurant and provide additional seating Capacity in a new building within the adjacent courtyard. The new catering facilities should follow the emerging.

Catering Strategy clearly reflecting the spirit of place and character of Knole.

The Quantity Surveying Practice (service provider) will be required to produce cost plans, bill of quantities, monthly financial reports for the contract administrator and client, monthly contract valuations and general cost advice to the "Inspired by Knole" project (Studio and Restaurant).

The CDM-C and Design Team Services who will be procured separately by the National Trust. The selected service provider will assist the Client in preparing the detailed cost advice for the main construction and adaptation works, to enable the detailed design work to be completed in accordance with the project programme/timetable. The service provider will also be expected to work closely with the Client's project delivery team, attending regular project meetings. Working closely with the Regional Procurement Manager, the service provider will assist in advising the Client as to the most appropriate tender approach including preparation of tender documentation and design of evaluation criteria. In collaboration with the Regional Procurement Manager, the service provider will assist with the tender process, identifying suitable contractors and specialists to be included in the Tender list. This will include, in conjunction with other specialists, obtaining tenders and conducting evaluation of bids against pre-defined criteria to enable appointment of contractors.

The service provider will complete appointment of contractors and prepare contracts and pre contract documentation to ensure site is prepared for handover to the selected main works contractor. The service provider will provide regular financial updates to the Client, and information required by all parties is communicated efficiently and effectively throughout the duration of the project to practical completion and finalisation of the account. The service provider will ensure that final accounts are agreed and settled, and will assist the client in preparation of project documentation and post project review. The service provider may be required from time to time to carry out other activities in relation to the project which are not specified above. Such activities shall not materially extend the scope of the service provider's involvement in the project.

All designs will conform to the National Trust's conservation and environmental policies.

Estimated value excluding VAT:

Range: between 2 000 000,00 and 2 300 000,00 GBP

II.2.2. Information about options

Options: no

II.2.3. Information about renewals

This contract is subject to renewal: no

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

Duration in months: 37 (from the award of the contract)

Section III: Legal, economic, financial and technical information

III.1. Conditions related to the contract

III.1.1. Deposits and guarantees required

Parent company guarantees may be required. Evidence of cover for professional indemnity, employer liability and third party liability will be required.

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

Payments to be made in stages (in accordance with a drawdown to be agreed with the Client).

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

Joint and several liability.

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: : In accordance with Article 45 of Directive 2004/18/EC and Regulation 23 of the Public Contracts Regulations 2006 (as amended):

1. All candidates will be required to produce a certificate or declaration demonstrating that the candidate, their directors, or any other person who has powers of representation, decision or control of the candidate have not been the subject of a conviction by final judgment for one or more of the reasons listed below:

(a) participation in a criminal organisation, as defined in Article 2(1) of Council Joint Action 98/733/JHA (1); (b) corruption, as defined in Article 3 of the Council Act of 26.5.1997 and Article 3 (1) of Council Joint Action 98/742/JHA respectively;

(c) fraud within the meaning of Article 1 of the Convention relating to the protection of the financial interests of the European Communities;

(d) money laundering, as defined in Article 1 of Council Directive 91/308/EEC of 10.6.1991 on prevention of the use of the financial system for the purpose of money laundering.

2. All candidates will be required to produce a certificate or declaration demonstrating that they are not bankrupt or the subject of an administration order, are not being wound up, have not granted a trust deed, are not the subject of a petition presented for sequestration of their estate, have not had a receiver, manager or administrator appointed and are not otherwise apparently insolvent.

Failure to provide such declarations will result in the candidate being declared ineligible for selection to participate in this procurement process.

III.2.2. Economic and financial ability

List and brief description of conditions: 1. All candidates will be required to provide a reference from their bank.

2. All candidates will be required to provide evidence of relevant professional risk indemnity insurance.

3. All candidates will be required to provide financial statements covering the previous 3 financial years, and including the total turnover of the candidate and the turnover in respect of activities which are of a similar nature to the subject matter of this notice.

III.2.3. Technical and professional ability

List and brief description of conditions:

Candidates must provide:

1. A comprehensive formal statement of the candidate's technical capabilities.
2. Evidence of the candidate's involvement with buildings of particular historic or architectural interest, including details of relevant experience as appropriate.
3. A statement of the candidate's average number of staff and managerial staff in each of the 3 previous years.
4. Details of the educational and professional qualifications of the candidate's managerial staff, and those of the named person(s) who would be responsible for providing the services or carrying out the work or works under the contract.
5. A copy of the candidate's company quality policy statement, together with evidence showing that the candidate's company quality system is compliant to a relevant quality standard.
6. Details of involvement with work similar to that required under this notice, which has been carried out by the candidate for a minimum of 3 other clients within the last two years, including relevant descriptions, plans and/or photographs of the works, and contact details of the clients for whom those works were carried out.
7. An indication of the proportion of the contract which is the subject of this notice, and the precise nature of the work, which the candidate would propose to sub- contract (if any).
8. In the event that the candidate is unable to demonstrate direct experience of involvement with work similar to that required under this contract, in respect of buildings of particular architectural or historic interest, such other information as
Will enable the contracting authority to assess the candidate's ability to carry out such work.
9. Evidence of effective collaborative working with other parties, relevant to projects of a similar nature and complexity.

Minimum level(s) of standards possibly required:

Evidence of sound business structure, strong technical capabilities, and adequate staffing arrangements is essential.

Membership of a relevant recognised professional body is essential. Recent experience of working on Grade 1 Listed buildings (or equivalent) is highly desirable.

Evidence of an acceptable quality management system is essential.

Evidence of ability to work collaboratively with clients, contractors, and other professional specialists, relevant to projects of a similar nature and complexity, is essential.

Knowledge and experience of working on buildings of similar character to Knole would be beneficial.

It should be noted that internal sign-off by the NT's Board of Trustees will be required at agreed stages and in line with the agreed cost plan. It is anticipated that full cost planning services will be required for a traditional form of building.

Contract procurement. The appointment will include any other financial tasks that are required to progress and complete the "Inspired by Knole" Project (Studios and Restaurant). Such activities shall not materially extend the scope of the service provider's involvement in the project.

III.2.4. Information about reserved contracts

III.3. Conditions specific to services contracts

III.3.1. Information about a particular profession

Execution of the service is reserved to a particular profession: no

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

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: and Maximum number 7

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

IV.3.2. Previous publication concerning this procedure

no

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

Payable documents: no

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

6.6.2012 - 17:00

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

22.6.2012

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

English.

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

VI.1. Information about recurrence

This is a recurrent procurement: no

VI.2. Information about European Union funds

The procurement is related to a project and/or programme financed by European Union funds:
no

VI.3. Additional information

Please note that there is no PPQ or additional information to be distributed at this stage. Please answer the questions in the notice. An invitation to tender will be sent to shortlisted candidates. Candidates are required to include the following with their application to participate. This information should be provided in CD-ROM format (3 copies).

1. A declaration in response to Section III.2.1.
2. The documents requested in Section III.2.2.
3. Detailed information in response to each point contained in Section III.2.3.

Applications will be assessed as follows:

1. Assessment of responses to Sections III.2.1 will be on a pass/fail basis. Candidates not achieving a "pass" result shall be disqualified from further consideration.
2. Assessment of responses to Section III.2.2 will be on a pass/fail basis. In addition to information submitted by candidates, the contracting authority may obtain and take into account independent financial reports obtained from recognised third parties. Candidates not achieving a "pass" result shall be disqualified from further consideration.
3. In respect of responses to Section III.2.3, failure to provide appropriate evidence in support of any element which is described as "essential" will disqualify the candidate from further consideration. Where such evidence is provided within the application, it will be evaluated and scored.
4. In responses to Section III.2.3, inclusion of evidence concerning elements which are described as "desirable" or "beneficial" is not mandatory, but if provided, such evidence will be assessed and scored. If no evidence is provided, a score of zero shall be awarded for that element.
5. Each element shall carry a maximum score of 20 points.
6. All elements described as "essential" shall carry equal weighting.
7. Other elements shall carry a weighting of 50 % of that applied to "essential" elements.
8. Weighted total scores shall be ranked. From the top-scoring candidates, it is envisaged that up to 5.

Candidates may be selected to receive the invitation to tender.

VI.4. Procedures for review

VI.4.1. Review body

Official name: As set out in Section I.1

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

3.5.2012