

**United Kingdom-Newcastle upon Tyne: Architectural, construction, engineering and inspection services**

OJ S 113/2016 14/06/2016

Contract notice

Services

Directive 2004/18/EC

**Section I: Contracting authority**

---

**I.1. Name and addresses**

Official name: National Trust

Postal address: Holy Jesus Hospital, City Road

Town: Newcastle upon Tyne

Postal code: NE1 2AS

Country: United Kingdom

Contact person: Project Manager

For the attention of: Helen Nisbet

E-mail: [helen.nisbet@nationaltrust.org.uk](mailto:helen.nisbet@nationaltrust.org.uk)

Telephone: +44 1912558648

**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**

Lead Design Consultant and Multidisciplinary Consultancy Services for Conservation and Infrastructure works. The Curtain Rises at Seaton Delaval Hall.

**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: Seaton Delaval Hall, The Avenue, Seaton Sluice, Northumberland, NE26 4QR.

NUTS code UKC21 Northumberland

### **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 Design Team Lead and multidisciplinary design team in connection with the conservation and repair of historic buildings and features, café facilities and infrastructure works at Seaton Delaval Hall.

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

71000000 Architectural, construction, engineering and inspection services, 71221000 Architectural services for buildings, 71222000 Architectural services for outdoor areas, 71240000 Architectural, engineering and planning services, 71241000 Feasibility study, advisory service, analysis, 71242000 Project and design preparation, estimation of costs, 71245000 Approval plans, working drawings and specifications, 71248000 Supervision of project and documentation, 71251000 Architectural and building-surveying services, 71300000 Engineering services, 71310000 Consultative engineering and construction services, 71320000 Engineering design services, 71312000 Structural engineering consultancy services, 71311300 Infrastructure works consultancy services, 71314000 Energy and related services, 71314310 Heating engineering services for buildings, 71315210 Building services consultancy services, 71315400 Building-inspection services, 71317210 Health and safety consultancy services, 71220000 Architectural design services, 71250000 Architectural, engineering and surveying services

### **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 focus for this Project is Seaton Delaval Hall in Northumberland, a Grade I listed mansion set within 'Grade II' registered park and gardens. This property was acquired by the National Trust in 2009 and has since undergone major conservation works. A further major conservation and interpretation project, entitled 'The Curtain Rises', is currently in development. 'The Curtain Rises' will include urgent conservation and infrastructure works. 'The Curtain Rises' prioritises all necessary works to conserve Seaton Delaval Hall: from the re-roofing of the West Wing to stabilisation of the ha-ha walls and bastions, from conserving the collapsing stable stalls to consolidating the derelict Mausoleum. We will also be addressing the visitor experience, from toilets and cafe to interpretation, to ensure that we put Seaton Delaval onto a sustainable footing for the future.

We are not, at this stage, able to undertake less urgent, although still desirable, restoration works across the estate. The Curtain Rises project is viewed as being the start of a new phase

of incremental activity and we know that there is much more to come.

Expressions of interest are invited from either single companies able to provide the full range of services required or from groups of consultants under the lead of a single design consultant. Interested companies should complete and submit the attached Pre-Qualification Questionnaire in accordance with the instructions in this document.

The SDH Curtain Rises Project is a conservation led project seeking to address priority conservation issues at Seaton Delaval Hall. In addition we want to improve the visitor experience on-site and are upgrading our facilities to meet expectations. The Conservation and Infrastructure scope is:

— Conservation: Deliver the urgent conservation work needed to save this Grade I Listed Building and its associated landscape. Work Packages have been identified to repair and consolidate the main mansion buildings and key landscape features:

1. WP2 West Wing: re-roof, upgrade of heating system to include conservation heating controls (and investigate renewable energy opportunities), general stonework and timber repair;
2. WP3 Central Hall: install flooring in the basement, complete outstanding masonry repairs, creation of designed infrastructure to enable creative interpretation of the spaces, includes potential for lift access;
3. WP4 Designed Landscape: masonry repair of Ha-Ha walls and bastions, masonry and timber repairs to Orangery, stabilisation of the Walled garden walls, includes extension of existing car park (additional 50 spaces);
4. WP5 Brewhouse: stabilisation through repair and conversion to a 90 cover cafe;
5. WP6 East Wing: creation of high quality visitor toilets, repair and consolidation of the Netty, address internal issues in the Stables, general stonework repair;
6. WP7 Wider Landscape: repair and stabilisation of the Mausoleum, small Obelisk, Sea Walk Walls and Egg Pond;
7. WP8 Making Good: removal of existing temporary structures and making good the site.

— Infrastructure: Provide facilities which are fit for purpose and enhance visitors' experience of the property. By creating more car parking spaces we will be able to welcome more people to the site, by creating high quality toilets we will be able to remove temporary intrusive structures and by converting a currently unused building into café we will be able to greatly improve the visitor offer and encourage more people to stay for longer.

The Architect will be required to act as Design Team Lead and Principal Designer under CDM Regulations, and assemble a Multi-disciplinary Design Team including Structural Engineer, M&E Consultant and any other specialist designers considered necessary but excluding Quantity Surveyor and Landscape Architect who will be procured separately by the National Trust. The Design Team (service provider) will be required to produce detailed plans and specifications and act as Contract Administrator from RIBA Stage 1 through to RIBA Stage 6 and completion. The work will be split into 2 phases: Development Phase (RIBA Stages 1 to 3) and Delivery Phase (RIBA Stages 4-6). The selected service provider will assist the Client in preparing the detailed scheme 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. The service provider will lead and develop the detailed design solutions, including identifying the appropriate construction, repair and adaptation method, to enable development of the specifications and working drawings and thereby enable tendering of the main works project following the OJEU procurement rules. Working closely with the National Trust Project Manager, the service provider will lead the team 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 National

Trust Project Manager, the service provider will manage 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 act as contract administrator, ensuring regular updates are available for the Client, and information required by all parties is communicated efficiently and effectively throughout the duration of the project to practical completion. The service provider will also ensure that practical completion and final inspections are made and ensure specifications have been met, and 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.

Phase 1 — Development Phase (RIBA Stages 1-3) funding has been secured. Phase 2 — Delivery Phase (RIBA Stages 4-6) is subject to a successful Heritage Lottery Fund Round 2 application. It is anticipated that the appointment will be for the whole project timetable from commencement to completion. However, the contract may be terminated in the event of unsatisfactory performance or should the project fail to obtain HLF Round 2 funding or the necessary statutory permissions.

Estimated value excluding VAT:

Range: between 400 000 and 500 000 GBP

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

Options: no

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

This contract is subject to renewal: yes

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

Duration in months: 48 (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 draw-down 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 of the European Parliament and of the Council 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 1 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 ability to work on 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 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 2 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.

8. In the event that the candidate is unable to demonstrate direct experience of 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 — e.g. RIBA, RICS or equivalent. Full Conservation accreditation is essential.

Recent experience of working on Grade 1 Listed buildings (or equivalent) is essential.

A working knowledge of relevant Conservation projects and relevant repair philosophies (e.g. Burra Charter or similar) is essential.

Evidence of how best your design team and approach provides local economic benefit would be beneficial.

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 Seaton Delaval Hall would be beneficial.

#### **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

Objective criteria for choosing the limited number of candidates: By selecting between 5 and 7 candidates to be invited to tender we will achieve a reasonable spread of competition, ensure a manageable procurement process and ensure that tendering costs are reduced. The minimum standards for selecting the limited number of candidates is set out in Section III) above. Further information about methodology for the evaluation of candidates' submissions is set out in the Pre-Qualification Questionnaire.

**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**

18.7.2016 - 17:00

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

21.7.2016

**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**

The Pre-Qualification Questionnaire specifies the requirements for all documentation required and the necessary formatting.

**VI.4. Procedures for review**

**VI.4.1. Review body**

Official name: National Trust — Legal Department

Postal address: Heelis, Kemble Drive

Town: Swindon

Postal code: SN2 2NA

Country: United Kingdom

E-mail: [caroline.steel@nationaltrust.org.uk](mailto:caroline.steel@nationaltrust.org.uk)

Telephone: +44 1793817851

Internet address: <http://www.nationaltrust.org.uk>

**Body responsible for mediation procedures**

Official name: Centre for Effective Dispute Resolution — if appropriate

Country: United Kingdom

**VI.4.2. Review procedure**

Precise information on deadline(s) for review procedures: The National Trust will incorporate a minimum 10 calendar day standstill period at the point information on the award of the contract is communicated to tenderers. This period allows unsuccessful tenderers to seek further debriefing from the contracting authority before the contract is entered into. Applicants have 2 working days from the notification of the award decision to request additional debriefing and that information has to be provided a minimum of 3 working days before the expiry of the standstill period.

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

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

10.6.2016