

HERITAGE TRUST
for the
NORTH WEST

HERITAGE TRUST FOR THE NORTH WEST

Pre-Qualification Questionnaire
for the
Appointment of Conservation Design Teams
for undertaking works to important
historic buildings in
the North West of England

September 2007

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SECTION 1

1. INTRODUCTION

1.1 The Heritage Trust for the North West is one of the largest specialist historic buildings preservation and conservation trusts in the UK. It was established in 1978 and has completed over 30 successful projects.

1.2 The Trust has an ongoing programme of historic building conservation projects and is continually becoming engaged in new projects. The size, scale and complexity of its projects ranges considerably; for example, from the completion of an exemplar conservation demonstration project on a small Victorian terraced house with a value of less than £50,000 to the conservation and re-use of a major country mansion and park with a value in excess of £5million. Irrespective of their size most of the Trust's projects involve negotiating complex packages of funding and often partnerships with other organisations. The Trust has a continuing dialogue with English Heritage, the Heritage Lottery Fund, the Regional Development Agency and local authorities, amenity groups and other agencies across the North West.

1.3 The Trust is also widely engaged in conservation training and education, supporting local community groups seeking to secure the future of historic buildings in their area, heritage interpretation and a range of heritage related activities.

1.4 The Trust wishes to appoint conservation and design consultants to assist in the development and implementation of its capital projects and due to their scope and complexity wishes to make these appointments under a five year framework agreement. The Trust is seeking a range of consultants capable of undertaking conservation projects ranging in value from £50,000 to £5 million and including;

Conservation Architects

Building Surveyors

Structural Engineers (with a specialist conservation experience)

Conservation Management Planners & Specialist Conservators

Cost Consultants

Historic Landscape Architects

Services & Environmental Consultants (with a specialist conservation experience)

1.5 Applications can be submitted by individual consultants but the Trust would welcome submissions covering all (or most) conservation building professional services integrated under a single consultant, lead by a specialist conservation architect.

1.6 Selection of consultants for the framework commissions will be based on the criteria set out below;

- Specialist technical expertise and accreditation
- Relevant experience
- Organisational capability
- Appropriate resources and personnel
- Design capability and sensitivity
- Ability to deliver successful projects
- Value for money
- Sustainability

SECTION 2

1 RETURN OF PRE-QUALIFICATION/SHORTLISTING INFORMATION

Interested parties wishing to participate must return:-

- the pre-qualification information set out in Section 4, and
- the statement at Sections 5 (fully completed)

To: **Fay Oldland**
Heritage Trust for the North West
Park Hill
Barrowford
Nelson
Lancashire
BB9 6JQ

By 12.00 noon GMT on Monday 1ST October 2007, copies received after the deadline will not be evaluated

Candidates must submit 1 hard copy of the documentation in a sealed envelope which should be marked 'Design Team PQQ ENCLOSED' and the project name.

- 2 Consultants will be considered either for an integrated Design Team appointment or on an individual basis. Only conservation architects with AABC accreditation will be considered
- 3 The Heritage Trust for the North West will not accept responsibility for any consultants costs incurred in their submission or tender.
- 4 Applicants are asked to present their submission following the order and format set out in this PQQ.

SECTION 3

PROCUREMENT PROCESS

1 Timetable

The main stages of the procurement process and the timetable are as follows:

- 1.1 Issue of the Pre-qualification Questionnaire upon request.
- 1.2 Expression of Interest and Pre-qualification Questionnaire **to be returned by Monday 1st October 2007.**
- 1.3 Invitation to Tender to be issued to short listed candidates on **Monday 8th October 2007.**
- 1.4 Receipt of tenders by 12.00 noon GMT on **Monday 5th November 2007.**
Note: Selected Candidates will be asked to make a presentation of their submission on a date to be advised.
- 1.5 Evaluation of tenders and recommendation of selected consultant by **Monday 19th November 2007**
- 1.6 Consultant Interviews, - Date **Monday 12th November 2007 TBC**
- 1.7 Appointment of Consultants by **Monday 26th November 2007.**

N.B. This timetable is indicative and may be subject to change

2 Enquiries and further information

All queries should be directed to:

**Fay Oldland
Heritage Trust for the North West
Park Hill
Barrowford
Nelson
Lancashire
BB9 6JQ**

Tel 01282 661738
E-mail: fayoldland@htnw.co.uk

SECTION 3

Other matters

3 The Trust reserves the right to reject or disqualify a candidate where:

the pre-qualification questionnaire is submitted late, is completed incorrectly, is incomplete or fails to meet the submission requirements which have been notified to candidates; and

- a) the candidate is unable to satisfy the terms of Article 29 of Directive 92/50/EC (see form 1) at any stage during the selection and evaluation process; and
- b) the candidate is guilty of serious misrepresentation in relation to its application and/or the process; and
- c) there is a change in identity, control, financial standing or other factor impacting on the selection and/or evaluation process affecting the candidate

All candidates are solely responsible for their costs and expenses incurred in connection with the preparation and submission of the pre qualification questionnaire and all future stages of the selection and evaluation process.

The Trust reserves the right to cancel the selection and evaluation process at any stage.

The consultant candidate should identify in his submission which of the following services he wishes to tender for and identify any proposed sub-contractors.

Measured and Building Condition Surveying

Architectural Conservation and Design Services

Conservation Management Planning and Specialist Conservation

Feasibility and Development Planning Consultants

Conservation Structural Engineering

Services and Environmental Engineering

Cost Consultancy

SECTION 4

1 PRE-QUALIFICATION INFORMATION

Interested candidates who wish to be considered for the tendering process are required to provide the following minimum information for themselves and each sub-contractor they propose to include in their tender.

2 CANDIDATE INFORMATION

2.1 The following information in relation to the candidate and all proposed sub-consultants :

- 2.1.1 Name;
- 2.1.2 Registered Office;
- 2.1.3 Registration number;
- 2.1.4 Year of registration;
- 2.1.5 Country of registration;
- 2.1.6 Principal contact name;
- 2.1.7 Address;
- 2.1.8 Telephone number;
- 2.1.9 Fax number;
- 2.1.10 E-mail address.

2.2 A General Description of the candidates business and

2.3 Profile of candidate's office that would execute this project.

2.4 Is the candidate part of a group of companies? If so, please provide details of the group structure.

3 EVIDENCE OF GOOD STANDING

3.1 A statement, in the format set out in Section 5, confirming that the candidate and its proposed sub-consultants is not, has not or has not been:

- in a state of bankruptcy, insolvency, compulsory winding up, administration, receivership, composition with creditors or any analogous state, or subject to relevant proceedings,
- convicted of a criminal offence relating to business or professional conduct,
- committed an act of grave misconduct in the course of business,
- failed to fulfil its obligations relating to the payment of social security contributions,
- failed to fulfil obligations relating to the payment of taxes.

3.2 Evidence of registration with any appropriate professional or trade body or register.

SECTION 4

4 EVIDENCE OF FINANCIAL STANDING

- 4.1** Name and address of principal banker together with banker's reference for the Candidate and its proposed sub-consultants :
- 4.2** VAT registration number.
- 4.3** Accounts Information
- 4.3.1** Company
- Audited accounts for the last three financial years. (If most recent accounts submitted are for a year ended more than 10 months ago please enclose latest set of management accounts).
- 4.3.2** Partnership
- Two copies of accounts, audited if available, for the last 3 years. (If the accounts you are submitting are for a year ended more than 10 months ago please enclose latest set of management accounts). The accounts should include:
- Profit and Loss Account.
 - Balance Sheet.
 - Full notes to the accounts.
 - Directors Report/Managing Partners Report (if available).
 - Auditor's Report (if accounts are audited).
- 4.4** A statement of the candidate's overall turnover in the last three financial years and the turnover of the office where this project would be executed from.
- 4.5** A statement of the candidate's turnover in respect of work of the type which is the subject matter of this tender .
- 4.6** Evidence of insurances held; [minimum £5 million professional indemnity insurance required]
- 4.7** A statement, as at the last reporting date, of any contingent liability or loss (where not otherwise reported) which would require disclosure in accordance with International Accounting Standard 10.
- 4.8** A statement of any material pending or threatened litigation or other legal proceedings (where not otherwise reported) where the claim is of a value in excess of £10,000.

SECTION 4

5 EVIDENCE OF TECHNICAL CAPABILITY

- 5.1** Evidence of the educational and professional qualifications of the candidate's, and its proposed sub-consultant's senior managerial staff, and in particular, those of the person or persons who will be responsible for carrying out the Services (attach CVs of key personnel).
- 5.2** A list of at least five similar contracts including work of repair and alteration to listed historic buildings of outstanding importance carried out over the past three years or currently being undertaken please provide the following details:
- Name of organisation to whom works/services provided.
 - Date of Contract.
 - Contract period.
 - Type of works/services/supplies undertaken/provided.
 - Value of Contract.
 - Contact name and address*.
- * Please provide contact name and address for each of the contracts listed to enable the Trust to take up references if necessary.
- 5.3** It is the requirement of the Trust that the candidate dedicates to this commission qualified architectural staff who have obtained accreditation in building conservation (AABC) and are registered as such with the RIBA. Details of the accredited staff must be submitted with registration references.
- 5.4** A statement of the facilities and technical equipment that would be employed by the candidate in carrying out the works and/or services.
- 5.5** A statement of the candidate's average annual manpower and the number of managerial staff for the last three years, for the offices that would execute this project.
- 5.6** Details of the quality assurance procedures which the candidate has in place and details of any applicable independent quality assurance standards.
- 5.7** Details of the technicians or technical bodies which the candidate can call upon for carrying out the work (whether or not they are employees of the candidate).
- 5.8** Details of the training and development programmes adopted by the candidate.
- 5.9** Details of which office the Consultant will propose to execute this commission.
- 5.10** A copy of the consultant's Health and Safety and Equal opportunity Policies.
- 5.11** Statement as to why the Consultant believes that their team is capable of delivering the successful design and delivery of this project.

SECTION 5

**STATEMENT RELATING TO GOOD STANDING
APPOINTMENT OF A CONSERVATION DESIGN TEAM
FOR THE
HERITAGE TRUST FOR THE NORTH WEST
CONSERVATION FRAMEWORK AGREEMENT**

We confirm that:

Name of Candidate(LEAD CONSULTANT)

has not or has not been

- in a state of bankruptcy, insolvency, compulsory winding up, administration, receivership, composition with creditors or any analogous state, or subject to relevant proceedings,
- convicted of a criminal offence relating to business or professional conduct,
- committed an act of grave misconduct in the course of business,
- failed to fulfil its obligations relating to the payment of social security contributions,
- failed to fulfil obligations relating to the payment of taxes.

Signed

Name/Post

Signed

Name/Post

For and on behalf of [name of candidate]