Dated

15/11/2015

**Invitation to Tender (ITT) for the supply of:**

**The Canons, Mitcham Design Team**

Tender Ref: DN50494

Invitation to tender

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| --- |
| NAME OF AUTHORITY: LONDON BOROUGH OF MERTON |
| ITT RETURN DATE & TIME (DEADLINE): **Monday 21st December 2015** |

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# Background to the Council

Formed in 1965, the London Borough of Merton (‘the Authority’) is an outer London borough to the south-west of the capital. It has a population of 200,000 residents living in 80,000 households, served by 7,500 businesses, and an area of approximately 14.7 square miles.

Population of 199,700 (Census estimate at May 2011) living in 78,757 chargeable dwellings. The population according to the Greater London Authority population projections is set to increase as follows: 206,612 by 2016, 209,666 by 2021, 211,783 by 2026 and to 213,931 by 2031.

The borough’s five main town centres are Wimbledon (taking in the Village, the Broadway and South Wimbledon), Mitcham, Morden, Raynes Park and Colliers Wood. Predominantly suburban in character, with high levels of commuter flows in and out of central London.

Merton is home to the world-famous All England Lawn Tennis Club, where the Wimbledon Championships take place every year bringing an extra 500,000 people into the borough for the tennis extravaganza.

The Council is a ‘unitary Authority’, which means that it is a single tier Authority responsible for all local governance functions within the area. This includes functions such as social services, libraries, waste disposal and collection, highways, education, planning, licensing and much more. The Council is not responsible for the emergency services, maintenance of principal roads and public transport which are provided by the Mayor of London’s departments.

The Council had a revenue budget of £151m in 2012/13 with around 45% of this being spent on social care. 4,081 FTE or 5,513 headcount (as at Jan 13) employees provide a range of public services, from street cleaners and town planners to teachers and social workers, who work in the four departments, including Merton’s schools:-

* Children, Schools and Families (CSF)
* Environment and Regeneration (E&R)
* Community and Housing (C&H)
* Corporate Services (CS)

Overseeing the running of these services and taking the lead in creating a vision for the future of Merton is the Leader of the Council. The Leader is elected by the full Council and appoints a Cabinet of up to nine Members who will each take on special responsibility for an area designated to them by the Leader. The Leader and Cabinet are collectively known as the ‘Executive’.

**The Council’s Corporate Priorities**

The financial reality facing local government dominates the choices the council will make for the future of the borough. The development of the Business Plan 2012/16 is therefore based on the set of guiding strategic priorities and principles, as adopted by the council on 13 July 2011;

* Merton should continue to provide a certain level of essential services for residents. The order of priority of ‘must’ services should be:-
  + Continue to provide everything that is statutory.
  + Maintain services – within limits – to the vulnerable and elderly.
* After meeting these obligations Merton should do all that it can to help residents who aspire. This means we should address the following as priorities in this order:-
  + Maintain clean streets and keep council tax low.
  + Keep Merton as a good place for young people to go to school and grow up.
  + Be the best it can for the local environment.
  + All the rest should be open for discussion.

The financial pressures facing Merton mean we should no longer aim to be a ‘place-maker’ but be a ‘place-shaper’. The council should be an enabler, working with partners to provide services.

The Community Plan has been developed by the Merton Partnership and sets the overall direction and vision for the borough until 2019.

1. **Service Overview**

**Objectives of this contract**

The purpose of this ITT is to obtain professional, properly defined and priced propositions and solutions for a landscape led design team to deliver the design and renovation of the area known as “the canons”.

The London Borough of Merton is looking to appoint a multi disciplinary design team to deliver the restoration and renewal of The Canons. This should be led by a Chartered Landscape Architect with appropriate experience in Restoration / Conservation of historic parks and buildings. The team should include other consultants where deemed necessary to ensure the development of the project, & undertake all work necessary to deliver a successful Stage 2 submission. The budget for the design team is £140 - £165k.

In order to take the project forward to a successful Round 2 submission, London Borough of Merton wish to appoint a professional design team that will work in partnership with the Canons Partnership (combining the local authority with three community partners) through the development stage to develop conservation/restoration/renovation and improvement proposals for The Canons site and its historic features and natural habitats including The Canons house.

The team will need to include Conservation Architecture expertise together with all other associated disciplines to progress the project and be able to demonstrate a strong track record of working with and alongside local communities

A separate tender has gone out for a Landscape Architect who will be working on the production of a Conservation Management Plan (CMP). The Design Team will be expected to work closely with the Landscape Architect and be guided by the results of the CMP. Due to the tight timeframe, the Design Team will be expected to work in tandem with the production of the Conservation Management Plan. The draft CMP is due to be produced by the end of February 2016 with the final document produced by the end of April 2016.

**Scope**

The overall vision for the Canons (never locally described as Canons Park) is to create an attractive, well maintained and well utilised open space, providing a range of activities for local residents and visitors along with an improved natural and historic environment. This project will restore Canons House and bring it back into community use.

This will meet the needs of the local community which values its local heritage but would like to see it made more accessible and have the opportunity to be more involved. Restoration of Canons House and Canons grounds will complement and support the regeneration of the town centre and promote economic growth in the Mitcham area. The project will engage the local community and, through training and involvement with the project will create a vibrant local hub of community activity

The Canons has an area of approximately 7.9 hectares and is located in the Cricket Green ward in the east of the borough. **Appendix B** is a map of the site. Please note the Canons leisure centre (to the centre of the site) and Park Place (to the south east of the site) fall outside of the scope of this project, and no survey work of these elements will be required. The plan will, however, be expected to describe how these buildings (and in the case of Park Place, its grounds) fit in relation to the setting and context of the wider site. Please see the specification for full details of the requirements.

The Design Team are expected to be involved in the production of a number of documents including a 10 year management and maintenance plan (including anticipated revenue costs) and a project timetable. The extent of the services required can be summarised as full design services, including landscape design, conservation architecture, architecture, and cost planning. Detailed drawings for submission for relevant permissions (planning, listed building consent, etc) will be produced by the Design Team.

**Terms and Conditions of Contract**

The draft Contract that the Council proposes to use is attached at **section 5.**

**Estimated Contract Value**

The project costs are estimated at £4m. There is an indicative budget for this work of £140,000 to £165,000

**Contract Term**

The proposed contract will be for 8 months from 8th February 2016 to 30th September 2016

The anticipated service Commencement Date is 8th February 2016

**Minimum standards applicable to this contract**

In order to be considered for this contract bidders must meet the following minimum standards, as set out further within this ITT;

* Mandatory and discretional exclusion criteria
* Examples of similar projects as set out in question 5.1 within Part A - the selection criteria.

**Indicative Timetable**

It is intended that the procurement process will follow the timetable detailed below, however this is provided for indicative purposes only;

|  |  |
| --- | --- |
| **Stage / Activity** | **Dates** |
| Publication of ITT | Friday 20th November 2015 |
| Site visits | Thursday 26th November 2015 and Wednesday 3rd December 2015 |
| Last date for ITT clarification questions | Friday 4th December 2015  17:00hrs |
| Closing date for receipt of ITT | Monday 21st December 2015 12:00hrs |
| Evaluation of ITT | w/c Monday 4th January 2016 |
| Clarification meeting (if required) | w/c 18th January 2016 |
| Notification of the Councils intention to award | Friday 29th January 2016 |
| Contract Commencement date | Monday 8th February 2016 |

# INSTRUCTIONS AND CONDITIONS FOR TENDERING

**Definitions**

“Authority” means the public sector contracting Authority, or anyone acting on behalf of the contracting Authority, that is seeking to invite suitable Suppliers to participate in this procurement process.

“You”/ “Your” or “Supplier” means the body completing these questions i.e. the legal entity seeking to be awarded the contract and responsible for the information provided. The ‘Supplier’ is intended to cover any economic operator as defined by the Public Contract Regulations 2015 and could be a registered company; charitable organisation; Voluntary Community and Social Enterprise (VCSE); Special Purpose Vehicle; or other form of entity.

**Completing the form**

Please ensure that all questions are completed in full, and in the format requested. Failure to do so may result in your submission being disqualified.

Text [in square brackets and highlighted in green] requires Suppliers to insert information as part of their response.

**Signatures**

Where required, the ITT must be signed in accordance with the options below;

1. Where the Supplier is an individual, by the individual, OR
2. Where the Supplier is a partnership, by duly authorised partners, OR
3. Where the Supplier is a limited company, by a director duly authorised for such purposes

You may submit electronic or typed signatures. However, should you be successful you will be required to resign all declarations that form part of the contract with an original signature.

**Confidentiality**

This ITT is made available on condition that its contents (including the fact that the Tenderer has received this ITT) is kept confidential by the Tenderer and is not copied, reproduced, distributed or passed to any other person at any time, except for the purpose of enabling the Tenderer to submit a Tender.

**Freedom of Information**

In accordance with the obligations and duties placed upon public authorities by the Freedom of Information Act 2000 (the ‘FoIA’) or Environmental Information Regulations (2004) (the EIR), all information submitted to the Council may in theory be disclosed in response to a request made pursuant to the FoIA or EIR.

In respect of any information submitted by an organisation that it considers being commercially sensitive, the organisation should:

* clearly identify such information as commercially sensitive;
* explain the potential implications of disclosure of such information; and
* provide an estimate of the period of time during which the organisation believes that such information will remain commercially sensitive.

Where an organisation identifies information as commercially sensitive, and even where it does not, the Council will endeavour to maintain confidentiality by assessing whether it is appropriate to apply the various exemptions available in the FoIA or EIR. Organisations should note, however, that, even where information is identified as commercially sensitive, the Council might be required to disclose such information in accordance with the FoIA or EIR. Accordingly, the Council cannot guarantee that any information marked ‘commercially sensitive’ will not be disclosed.

**Supplier Clarifications and questions**

Any queries regarding this ITT or the procurement process should be submitted electronically, via the London Tenders Portal – [www.londontenders.org](http://www.londontenders.org) - no later than 17:00pm on Friday 4th December 2015.

Clarifications and questions should be raised through the ‘messaging’ function, within the ITT summary page of the London Tenders Portal.

The Council will respond to all reasonable clarifications as soon as possible through a document listing Suppliers questions and the Council’s response to them (Clarifications Log), which will be sent to all Suppliers expressing an interest in the process.

**Site Visits**

It is the intention of the Council to conduct site visits. These site visits will be a tour of the site and will be held on Thursday 26th November 2015 and Wednesday 2nd December 2015. Bidders should notify the Council of their intention to attend via the messaging function on the London Tenders Portal

Any technical questions should be submitted / recorded in writing and will be responded to in line with the clarification and questions section above if they cannot be answered at the time.

Please note that spaces on the visit may be limited and bidders are to provide a list of proposed attendees via the messaging function on the London Tenders Portal. The Council reserves the right to restrict the number of attendees per bidder so all bidders can be represented if they wish.

**Submitting the ITT**

Your completed ITT should be submitted no later than 12pm (noon) on Monday 21st December 2015 12:00hrs through the London Tenders Portal at [www.londontenders.org](http://www.londontenders.org) .

The Suppliers attention is specifically drawn to the date, time and method of submission – you should allow adequate time to submit your response via the Portal, as no submission after the specified deadline will be considered.

Submissions via the London Tenders Portal can not be opened by the Authority until after the deadline has passed.

The Authority will contact you through the London Tenders Portal at the conclusion of this ITT process to inform you whether you have ben successful.

**Additional Information**

Any change in the status or eligibility of a Tenderer must be notified immediately to the Council in writing and may result in that Tenderer being disqualified from any further participation in the procurement process.

The Authority reserves the right to cancel this procurement at any time and not proceed with the award of any contract at any stage of the procurement process.

Suppliers are solely responsible for their costs and expenses incurred in connection with the preparation and submission of their response to this ITT and all future stages of the procurement process. Under no circumstances will the Authority or any of its advisors be liable for any costs or expenses borne by the Supplier or its associated relevant organisations or any of its advisors in this process whether the Supplier is successful or otherwise.

## **Conditions of Contract**

The draft Contract that the Council proposes to use is attached at Schedule 7. By submitting a Tender, Tenderers are agreeing to be bound by the terms of this ITT and the Contract without further negotiation or amendment.

A supplementary collateral warranty will also be required for sub contracting arrangements.

If the terms of the Contract render the proposals in the Tenderer's Tender unworkable, the Tenderer should submit a clarification and the Council will consider whether any amendment to the Contract is required. Any amendments shall be published through the Clarifications Log and shall apply to all Tenderers. Where both the amendment and the original drafting are acceptable and workable to the Council, the Council shall publish the amendment as an alternative to the original drafting. Tenderers should indicate if they prefer the amendment; otherwise the original drafting shall apply. Any amendments which are proposed, but not approved by the Council through this process, will not be acceptable and may be construed as a rejection of the terms leading to the

**Council's Rights**

The Council reserves the right to:

* Waive or change the requirements of this ITT from time to time without prior (or any) notice being given by the Council.
* Seek clarification or documents in respect of a Tenderer's submission.
* Disqualify any Tenderer that does not submit a compliant Tender in accordance with the instructions in this ITT.
* Disqualify any Tenderer that is guilty of serious misrepresentation in relation to its Tender, expression of interest or the tender process.
* Withdraw this ITT at any time, or to re-invite Tenders on the same or any alternative basis.
* Choose not to award any Contract as a result of the current procurement process.
* Make whatever changes it sees fit to the Timetable, structure or content of the procurement process, depending on approvals processes or for any other reason.

# SPECIFICATION

* 1. **Background:**
     1. This brief sets out the requirements for a Design Team to work on improvements to The Canons, Mitcham. This open space and manor house are located within the designated Mitcham Cricket Green Conservation Area and includes a number of listed buildings and structures.
  2. **The Canons**
     1. The Domesday Book records 250 people living in two hamlets, Mitcham (modern Upper Mitcham) and Whitford (Lower Mitcham). The first mention of the Canons area was documented in 1107 when an Augustinian Priory was established here by the nuns of St Mary Overie of Southwark.
     2. The Canons has an area of approximately 7.9 hectares and is located in the Cricket Green ward in the east of the borough. Appendix A is a map of the site. Please note the Canons leisure centre (to the centre of the site) and Park Place (to the south east of the site) fall outside of the scope of this project, and no survey work of these elements will be required. The plan will, however, be expected to describe how these buildings (and in the case of Park Place, its grounds) fit in relation to the setting and context of the wider site.
     3. The Canons currently serves a number of different users including dog walkers, playing children, joggers, walkers, and formal groups such as The Little League football groups. In addition to this, there is a leisure centre situated in the centre of the site. The site, as a whole, is relatively underused, with limited awareness among the local community and many existing users are not aware of the historic importance of the site or its natural heritage, including its diversity of habitats, wildlife and historic landscapes. The “secret” nature of parts of the area is also, however, part of its charm.
     4. The site used to form part of the wider grounds of the Cranmer family estate, and its occupation can be traced back to pre-1100AD. There are a number of significant features within and immediately surrounding the site, and some of these will be looked at in more detail below.
  3. **The Canons house:**
     1. This substantial manor house dates back to the Restoration period and is Grade II\* listed. The main part of the building was built in 1681, during the reign of Charles II, by John Odway and is constructed of brick with the later addition of stucco with a plain tile hipped roof to eaves. The building is four storeys in height, including basement and roof space accommodation. Notable features of the building include a central projecting bay with square headed architraved corniced entrance and large sash windows. The building has been altered over time in a piecemeal fashion and in many ways this adds to the value of the property. It is still of considerable heritage importance.
     2. The Canons house is currently unoccupied on the lower floors with a tenant living on the upper floor of the building. Its most recent use was as local authority offices. There is no public access. A basic report of the property was conducted in July 2014 and this is attached as **Appendix E**.
  4. **The Dovecote:** 
     1. The Grade II listed building dates back to 1511. The Dovecote is the oldest building in Mitcham. The building is a square single storey structure made of limestone, knapped flint and red brick quoins. The Dovecote has no windows and a solitary entrance door with a pointed cambered arch to the east elevation. The roof has been the focus of vandalism and has been subject to a number of emergency repairs. The building is not presently in use and there is no public access. The Dovecote features on the national Heritage at Risk register.
  5. **The Obelisk:**
     1. This Grade II listed structure was built in 1822. The obelisk was erected to commemorate the end of a serious drought. The inscription upon it reads
        1. *'In grateful recollection of the goodness of God through whose favours water has been provided for this neighbourhood/God opened the rock and the waters gushed out, they ran in dry places like a river. Psalm CV v 41/He turneth dry ground into water springs. Psalm CVII V 35 / Let everything that hath breath praise the Lord. Psalm CL v 6 / A fountain shall water the valley. Joel III v 18'.*
     2. Much of the inscription has been weathered and is barely visible in places.
     3. Although not within the current boundary walls of The Canons site, the obelisk is located on the pavement at the junction of Madeira Road and Cricket Green (at the south-west corner of the site) and was historically part of The Canons grounds. Although in need of some repair, the Obelisk has a significant visual relationship to The Canons site.
  6. **Other notable features:**
     1. As well as the listed buildings/monuments mentioned above, there are a number of features worthy of mention on The Canons site. There is an historic pond associated with the dovecote (pond survey undertaken in September 2013 attached as **Appendix F**), which played a key part in the stage 1 bid, and a cinder running track which was part of the grounds of Mitcham Athletic Club. This part of the site has strong historic sporting associations, including as a training ground for Olympic athletes (including Dorothy Tyler who won a silver medal at the 1936 Berlin Olympic Games), scene of the first woman’s road race in the world, the starting point for the iconic London to Brighton ultra-marathon and the venue for the first korfball game in the UK. It is adjacent to the oldest cricket ground in the world where the game has been played continuously since 1685.
     2. The site also has a rich natural heritage including a wide array of trees including fig and olive, habitats and wildlife. One example of this is the presence of bats on the site which has been confirmed by bat surveys carried out in 2008, 2009, 2012, 2013 and 2014. These indicate three species of bat in The Canons. There is a fine assemblage of specimen trees and a locally important copse.
     3. There is also a walled garden which was constructed in 1765, with walls built by James Cranmer. The site includes a number of old walls, including boundary ones and some within the site. Cold Blows – an historic route – runs along the northern edge of the site. There is also a lodge building within the site – located near to the obelisk. This would have been constructed at a not dissimilar time to The Canons house. There is another house by the Madeira Road entrance. This is a much more recent building. Both of these are currently occupied by tenants. Along the boundary of Commonside West there are a number of buildings, including The Windmill public house and the home of the sea cadets.
  7. **The site in context**
     1. The Canons lies on the eastern side of LB Merton, an area which has changed in the past two decades, and continues to change rapidly in terms of its demographic profile. While LB Merton as a whole does not present high indices of deprivation, this is partly because the Wimbledon area of Merton is highly affluent which ‘skews’ the averages. In fact The Canons area of Mitcham has significant pockets of deprivation. The Canons is situated in Cricket Green Ward, close to the boundary of Figges Marsh Ward and to Mitcham Town Centre. Please see **Appendix G** for a profile of Cricket Green ward.
     2. The demographic profile of the area has a diverse cultural mix. 1 in 2 residents of the Cricket Green ward is of BAME backgrounds, and has an average higher than the wider borough of residents aged between 0-24. The life expectancy for both men and women in this ward is lower than the borough average.
     3. Though relatively well served by open spaces, many local residents are not regular users of The Canons. This is partially due to the appearance of the site and not capitalising on its true potential. Some of the site has poor visual accessibility and much of the facilities within the site are in need of renewal (hence the application to the Lottery Parks for People strand).

* + 1. An aspiration that has been highlighted in feedback to stage 1 bid is the lack of both a café within The Canons and public toilet facilities. These are both high priorities for local people. Lack of both these amenities is a further barrier to accessibility and meeting the future needs of regular users of The Canons.
    2. While there are some committed and knowledgeable local community groups keen to bring life back into The Canons house and grounds, many local people who use the open spaces know little about the history and heritage of the area and few visit the grounds. Currently the house is difficult to spot for the casual visitor to The Canons - the front elevation of the house itself is heavily obscured by trees, especially in the summer, while the rear is masked by the high walls of the walled garden and by dense conifers which provide an interesting and secluded walkway but which also serve to mask the house from the leisure centre car park at the rear.
    3. Despite this, there is a clear interest in bringing the house back into community use, among both those who know it well and those who have less knowledge of the site, and discussions with the community and stakeholders have identified the following issues:
    - The wish for a café and public toilets in the Cricket Green/Canons area
    - The wish for safe and interesting activities for children and families
    - There is an overwhelming appreciation of the open spaces
    - The informal spaces are appreciated and used well
    - People are very engaged with and value the heritage of the site even if they don’t know the detail
    1. One suggestion mooted is that The Canons should provide an element of arts/culture and it is clear that The Canons may have the potential to provide it. The house, with Madeira Hall, provides spaces which can increase awareness of, and encourage engagement with, the area’s interesting historical, natural and cultural heritage, as well as provide a focal point for visits to The Canons open spaces, and offering the local community access to a wide range of cultural activities, exhibitions and performances, and learning opportunities for all ages. This can be achieved through better use of the gardens, Madeira Hall and above all The Canons house itself, and incorporating a café and public toilets.
    2. Your attention is drawn to **Appendix C** which contains the full stage one bid.
  1. **Rationale for commissioning a Design Team**
     1. A Design Team is being commissioned by the London Borough of Merton. The Canons has been awarded a Parks for People first round grant.
     2. In order to take the project forward to a successful Round 2 submission, London Borough of Merton wish to appoint a professional design team that will work in partnership with the Canons Partnership (combining the local authority with three community partners) through the development stage to develop conservation/restoration/renovation and improvement proposals for The Canons site and its historic features and natural habitats including The Canons house. The team will need to include Conservation Architecture expertise together with all other associated disciplines to progress the project and be able to demonstrate a strong track record of working with and alongside local communities.
     3. The purpose of this brief is to describe the basis on which the Council wishes to procure a professional Design Team to secure the best investment in The Canons.
     4. A separate tender has gone out for a Landscape Architect who will be working on the production of a Conservation Management Plan (CMP). The Design Team will be expected to work closely with the Landscape Architect and be guided by the results of the CMP. Due to the tight timeframe, the Design Team will be expected to work in tandem with the production of the Conservation Management Plan. As part of the CMP production, a number of reports and studies will be undertaken – these include, but are not limited to:
* Archaeological desktop study
* Ecological studies
* Historical tree survey
* Structural condition surveys of all heritage assets
* Hydrology study (pond)
  + 1. The Parks for People Programme has a strong emphasis on local involvement and work with local communities in particular Friends (e.g. Friends of the Canons) and the wider community. Consultants must ensure adequate provision is made for this element of the overall project. The local area has a number of local interest groups including Mitcham Cricket Green Community & Heritage and Mitcham Society. These two groups along with Friends of the Canons comprise the community partners in the Canons Partnership with London Borough of Merton The local community is very active and we have a partnership approach to this project.
    2. The Design Team are expected to be involved in the production of a number of documents including a 10 year management and maintenance plan (including anticipated revenue costs) and a project timetable. The extent of the services required can be summarised as full design services, including landscape design, conservation architecture, architecture, and cost planning. Detailed drawings for submission for relevant permissions (planning, listed building consent, etc) will be produced by the Design Team.
    3. The Team should be a Landscape led team with a single point of contact for the Council.
  1. **RESOURCES & PROGRAMME**
     1. London Borough of Merton is committed to the restoration and revitalisation of The Canons and has committed £35k match funding necessary to apply for a Stage 2 award under the Parks for People programme.
     2. The overall project budget of £4.0m includes conservation and restoration costs for The Canons house and grounds, provision of new facilities, such as the café and toilets, restoration of historical features, new buildings, all relevant surveys investigations, professional fees / development costs, community engagement, contingencies, and inflation. The budget for the design team is £140-165K
     3. The stage one bid covered a variety of works to both buildings and the landscape
        1. **The Canons grounds:**
* Landscaping works
* New play equipment with exploration of natural play options
* Enhancements to pond and surrounding walkway
* Restoration of the historic cinder running track
* Improving the relationship of the obelisk with the wider site
* Repairs and increasing awareness of the Dovecote
* Improvements to the copse areas
  + - 1. **The** **Canons house:**
* Restoration/refurbishment/improvement of the house to bring the property back into public use as a community facility
* Provision of a glazed structure linking Canons house with Madeira Hall to facilitate café and toilet facilities
* Improvements to the terrace to the rear of Canons house
  + 1. A full list of works submitted under the stage one bid can be found in **Appendix H**.
  1. **BASIS OF COMMISSION**
     1. Landscape & Architectural Design Team Requirements
        1. The London Borough of Merton is looking to appoint a multi disciplinary design team to deliver the restoration and renewal of The Canons. This should be led by a Chartered Landscape Architect with appropriate experience in Restoration / Conservation of historic parks and buildings. The team should include other consultants where deemed necessary to ensure the development of the project, & undertake all work necessary to deliver a successful Stage 2 submission.
     2. We would expect to see the following essential team members:­
        + Lead Chartered Landscape Architect (direct single point of contact to the council)
        + Chartered Architect
        + Conservation Architect (either within team or appointed directly by successful consultant)
        + Historic Landscape Adviser (as above)
        + Chartered Structural Engineer specialising in historic building conservation. (as above)
        + Chartered Quantity Surveyor
        + Chartered Mechanical and Electrical Engineers
        + Specialist in Parks and Green Space Management
        + Clerk of Works (conservation building / landscape)
        + Planning consultant
        + BREEAM advisor
        + Archaeologist
        + Ecologist
     3. Other Possible Team Members
        1. Consultant teams should consider the scope of work required to be delivered and propose a co-ordinated team with all the professions that they consider necessary to deliver the commission. The consultant should suggest any further supporting disciplines in addition to those listed above that they consider will be necessary to deliver the commission. These may include some or all of the following, and/or other specialists not listed here:
        + Lighting Engineer
        + Chartered Civil Engineer
        + Geotechnical Advisor
     4. It is acknowledged that all of these professional disciplines may not exist with a single company and that it may be necessary to assemble a team across various companies or consultancies. This is considered to be an appropriate approach although we would expect to see a clear lead in such a team to give us a single point of contact. Where possible, evidence that the team has worked together before on similar projects should be provided as part of the tender response.
     5. In order to allow for bids to be comparable, bids should set out a breakdown of the cost of the essential team members (section 4.10.2). Additional team members (as per section 5.3) should be broken down separately
  2. **COMMISSION**
     1. The commission will be up to RIBA stage 4 (equivalent Landscape Institute stage E) to enable a comprehensive Round 2 application to be submitted by October 2016.
  3. **SERVICES REQUIRED**
     1. TheCanons house
        1. We will require the Design Team to undertake the RIBA Basic Services from Stages 1 to 4 as below ­ (in accordance with RIBA Schedule of Design Services SS­DS­07)
        + Stage 1 - Preparation
        + Stage 2 – Concept design
        + Stage 3 – Developed design
        + Stage 4 - Technical design (including all documents required for the submission of listed building consents and planning applications).
     2. Specific additional requirements relating to Stages 1 to 4: **­**
        1. Detailed structural analysis of The Canons house, providing options for the proposed refurbishment showing different ways that the brief can be met including full costings for individual elements.
     3. The Canons grounds
        1. We will require the Landscape Design Consultant to undertake the Landscape Institutes Basic Services from Stages A to E as below ­ (in accordance with the Landscape Consultants Appointment Part 1: Landscape Consultants Services)
        + Stage A Inception
        + Stage B Feasibility (including arranging for topographical and other surveys)
        + Stage C Outline proposals (including the provision of concept design proposal options)
        + Stage D Sketch proposals (including the provision of costs for various options)
        + Stage E Detail Proposals (including all documents required for the submission of planning applications and other statutory consents).
        1. It is recognised that the above basic stages are slightly different for each discipline but broadly follow the same approach and we expect the successful consultant to bring the two aspects of the project, the house and the grounds, together as one seamless project to be worked up simultaneously and presented in its entirety.
     4. Conservation Management
        1. A separate tender has gone out for the production of a Conservation Management Plan in accordance with HLF guidance document “Conservation Management Planning April 2008” for submission at Round 2. The guidance document is available as a pdf download via the HLF: ­ [http://www.hlf.org.uk/aboutus/Pages/allourpublications.aspx](http://www.hlf.org.uk/aboutus/Pages/allourpublications.aspx%20%20)
        2. The successful consultancy is expected to work closely with the architects compiling the Conservation Management Plan as the CMP analysis, evaluation and policies will need to guide the design and conservation philosophy and specific proposals
     5. 10 year maintenance and management plan
        1. Many of the problems facing heritage sites stem from the result of long-term neglect or lack of maintenance. With this in mind, the consultant is expected to produce a 10 year management and maintenance plan in accordance with HLF guidance document ‘Management & Maintenance Planning’ Nov 2008 available as a pdf download via HLF website: <http://www.hlf.org.uk/aboutus/Pages/allourpublications.aspx>
        2. This document will set out what maintenance is required, when it will be done, and by whom. This document forms part of the stage 2 bid to the HLF. This piece of work will be guided by the Conservation Management Plan, and the policies and conclusions that this document reaches.
     6. Business Plan
        1. A business plan is being produced to work out a financially sustainable use of Canons House. The designs will be expected to be informed by the outcomes of this document.
     7. Community engagement
        1. The majority of the engagement work will be carried out by the Community Engagement Officer and Project Manager working with the community partners although the consultant is expected to provide visual material for the purposes of public engagement on the proposals. In addition, the consultant would be required to attend engagement sessions/exhibitions. The outcomes of the engagement should also inform the design approach. In terms of visual material, the provision of 6x A0 sized presentation boards with relevant plans/diagrams etc. would be required.
     8. Meetings
        1. There will be a requirement for the Consultant to attend meetings at the following points during the first stage of commission.
        + Introduction meeting
        + Production of a draft framework/masterplan
        + Production of design options with a spreadsheet of associated costs
        + Production of a draft 10 year maintenance and management plan.
        1. Three hours should be allowed for each of these meetings. An allowance for 12 ad hoc meetings of 2 hours duration each should be included in the tender bid
     9. Other Surveys and Investigations
        1. Other surveys and investigations have been identified to provide baseline data necessary for project development at the early stages: The appointed consultant will be required to arrange for the following surveys and investigations to be undertaken, by means of method 1 and /or 2 below: 3 quotes should be obtained if the work is over £10k in value.
        + Within the successful practice should appropriate skills be available,
        + If the skills are not available within the successful practice, to sub-contract to appropriate specialists. Please submit quotations for all surveys.
        + The consultant will be expected to project manage the whole process including briefing, selection, monitoring & payments.
        + Where provisional sums are allocated, only actual costs will be paid, all surveys have to be following the financial regulation and require 3 quotes based on the lowest of 3 quotations to be sought by the consultant and approved by the client.
     10. Investigations required:

* + - * Asbestos Survey – Intrusive survey for refurbishment or grade 2 listed building.
      * Drainage, Utility Survey and Topographic survey within site boundary­ (with particular emphasis to building curtilage) and 1.0m beyond the overall site boundary.
      * Investigate mechanical and electrical challenges/conditions. (Including load check of existing supply and utilities / alarm and security issues / type of water provision/telephone/data/security/ access control etc.).
      * Structural report with recommendations and outline proposals and cost estimates to enable refurbishment of this listed building and outbuilding and other listed structures in accordance with Euro codes.
      * Detailed Building Condition survey of main buildings and outbuildings including consultation with Planning /Building Control (including Fire Service and to advice on strategy for Fire Safety). Survey to including poor internal and external elements
      * Site specific Health & Safety file/plan.
      * Any other reports studies deemed necessary (these should be itemised in the bid)
    1. Key Milestones
       - Production of draft landscape framework/masterplan – 24/04/2016
       - Production of draft buildings framework/masterplan – 24/04/2016
       - Production of final landscape framework/masterplan – 03/06/2016
       - Production of final buildings framework/masterplan – 03/06/2016
       - Production of ‘options’ drawings and costings – 24/06/2016
       - Production of draft Maintenance and management plan – 12/07/2016
       - Production of all drawings for submission for planning and listed building consent applications – 02/09/2016
       - Production of final Maintenance and management plan – 30/09/2016

# CONTRACT TERMS AND CONDITIONS

Please refer to **Appendix C** – T&C

and **Appendix D** – Collateral Warranty

# EVALUATION PROCESS AND AWARD CRITERIA

Any Contract awarded as a result of this procurement process will be awarded on the basis of the offer that is the most economically advantageous to the Authority. The Award Criteria are:

* 70% technical or quality.
* 30% cost.

**6.1 ITT Evaluation and Scoring Methodology**

**Stage 1 – Compliance Checks**

The Councils e-procurement system, the London Tenders Portal, will log all ITT submissions upon receipt. Late submissions will not be considered.

All responses will be checked to ensure that all ‘Yes / No’ questions have been addressed and that all documents requested have been attached. In the event that a Supplier is unable to provide a positive response to any of the questions, or a suitably detailed reason as to why a positive response cannot be given, the Authority may either exclude the Supplier from further participation in the selection process or, at its discretion, may seek clarification. In the case of the latter, a failure by a Supplier to provide a satisfactory response within the deadline specified in the request for clarification may result in its exclusion from the selection process.

The compliance checking process will also determine that none of the circumstances contained within Section 2 of the ITT (Grounds for Mandatory and Discretionary Exclusion) apply and that the supplier is able to meet all of the minimum requirements (Part A: Selection Criteria). If one of the circumstances described therein does apply or the supplier is not able to meet one of more of the minimum requirements, the Authority is within its right, having considered all the relevant circumstances, to exclude the Supplier from the selection process.

The financial analysis undertaken by the Authority will use published results for Turnover, net Worth, Working Capital, Debt and company Losses (if any) to assess:

1. The capacity of the company to undertake additional contracts relative to its existing level of turnover;
2. The liquidity of the company;
3. The level of exposure the company has to long term debts.

**Stage 2 – Individual Evaluations**

All responses that have passed the initial compliance checks will then be issued to the evaluation panel for scoring, who will review the suppliers Part B response. It is envisaged that the panel will consist of a minimum of 3 members.

Each member of the evaluation panel will independently score each response. The scored criteria will be assessed on a using the following scale of awarding marks between 0 and 5 as detailed below;

|  |  |
| --- | --- |
| **Score** | **Score Justification** |
| **0** | **Completely unsatisfactory/unacceptable response**  No response to the question or serious deficiencies in meeting the required standards. |
| **1** | **Very Poor response**  The response significantly fails to meet the required standards, contains significant shortcomings or is inconsistent with other proposals. |
| **2** | **Poor response**  The response is partially compliant with some shortcomings in meeting the required standards. |
| **3** | **Average response**  The response is compliant and meets the basic contract standards. Any concerns are only of a minor nature. |
| **4** | **Good response**  The response is fully compliant and clearly indicates a full understanding of the contract. The required standards consistently deliver all the required contract standards. |
| **5** | **Excellent response**  The response is fully compliant and indicates the ability to exceed the required standards of the contract. |

The formula used to calculate the weighted scores for each of the sub-criteria is the score given to each sub criteria multiplied by the weighting factor shown for that sub criteria i.e.

*Question Weighted Score (%) = (Tenderer’s score / 5) x Question Weighting.*

**If a submission does not achieve at least 50% of the available quality marks it will be eliminated from the selection process.**

The Council may at this stage pose clarification questions to the Supplier, in order to assist the evaluation process. Any such clarifications will be sent via the Authority’s e-procurement system, as such Suppliers are advised to monitor the system on a regular basis

**Stage 3 – Moderation**

Following the panels independent evaluation, moderation will take place in which each evaluators score is compared with the scores of the other evaluators and a consensus view will be taken to agree the scores to be awarded.

**Stage 4 – Price Evaluation**

The returned Quotation must include a duly completed Pricing Schedule in the format set out below. Suppliers should provide a economically sound, innovative and commercially attractive proposal

Tenderers are to provide a detailed breakdown of time and costs allocated to the commission. This should take the form of a spreadsheet that clearly shows all elements of the project, the days allocated against each of these for all members of the design team, their discipline/role and their corresponding daily rate. The price submission should be the price to complete all works detailed in the brief. From this matrix it must also be clear how many days each individual throughout the project allocates to each element as well as gross number of days to be provided.

The bid that has the lowest overall price (including the cost to the Authority) will be awarded a score of 100% and the scores for the other bids will be pro-rated relative to the lowest price using the following formula:

*(Lowest price ÷ other Quotation’s price) x Question weighting = Price weighted score*

**Stage 5 – Calculation of the Total Score**

The total score per tenderer will be calculated by adding the price and quality score together.

It is the Council’s intention to invite those tenderers achieving the top 3 highest scores to attend a clarification meeting. The Council reserves the right to invite more or less bidders in the event of a statistical tie or where the scores are too far apart to provide a realistic opportunity to certain bidders to be awarded the contract.

The evaluation panel will review the scores given based on the assessment of the written tender submission and may adjust these to reflect the outcome of the clarification meeting

It is the intention of the Council to hold the clarification meetings on w/c 18th January 2016 The Council will contact the bidders to arrange specific times and dates.

Bidders should note that the maximum amount of attendees representing their organisation is limited to 4.

**Stage 6 – Final selection**

The highest scoring Supplier will be identified as the preferred bidder and all Suppliers invited to tender will be notified and debriefed regarding the outcome of the evaluation process.

**6.2 Part A: Selection Criteria**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **SECTION** | **SUB SECTION** | **CRITERIA** | **ASSESSMENT** | **SCORING** |
| 1 | 1.1 – 1.4 | Supplier Information | This section is not scored as the answers to the questions are for information only.  Suppliers may be excluded on the grounds of providing insufficient or false information.  **All sections must be completed.** | Information only |
| 2 | 2.1 – 2.3 | Professional Conduct | The Authority will exclude any Suppliers if any of the mandatory grounds for rejection apply.  The Authority is entitled to exclude any Suppliers if any of the discretionary grounds for exclusion apply.  The Authority will, in both cases, consider all the relevant circumstances, and may at its discretion allow a Supplier to proceed.  **Pass / Fail question – Suppliers failing to meet a minimum requirement threshold will be rejected.** | Pass / Fail |
| 3 | 3.1 – 3.3 | Financial Information | The Authority will exclude any Suppliers failing to meet a minimum requirement threshold.  **Pass / Fail question – Suppliers failing to meet a minimum requirement threshold will be rejected.** | Pass / Fail |
| 4 | 4.1 | Insurance | All Suppliers expressing an interest to supply the Council must have, or be able to obtain, the minimum levels of insurance cover.  **Pass / Fail question – Suppliers failing to meet a minimum requirement threshold will be rejected.** | Pass / Fail |

**6.3 Part B: Award Criteria**

|  |  |  |  |
| --- | --- | --- | --- |
| **Criteria** | **Sub Criteria** | **Weighting** | **Sub Criteria Weighting** |
| **Technical & Quality** |  | **70%** |  |
|  | **Understanding of the Project** |  | 15% |
|  | **Project delivery plan and organisation of the works.** |  | 15% |
|  | **Staffing** |  | 10% |
|  | **Communication** |  | 10% |
|  | **Approach to engaging the community** |  | 10% |
|  | **Identifying and Managing risks** |  | 10% |
| **Price** |  | **30%** |  |
|  | Whole life cost |  | 30% |

**SUPPLIERS TENDER RESPONSE**

**PART A****: Selection Criteria**

1. **Supplier Information** 
   1. **Supplier Information**

This part of the ITT asks for general information about your company and its bidding model, the information will not be scored however if any information is not completed it could result in your submission being rejected. You must notify the Authority if any of this information changes after you have submitted your response.

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Supplier details** | **Answer** | |
| 1.1.1 | Full name of the Supplier completing the ITT |  | |
| 1.1.2 | Registered company address |  | |
| 1.1.3 | Registered company number |  | |
| 1.1.4 | Registered charity number |  | |
| 1.1.5 | Registered VAT number |  | |
| 1.1.6 | Name of immediate parent company |  | |
| 1.1.7 | Name of ultimate parent company |  | |
| 1.1.8 | Please mark the relevant box to indicate your trading status | 1. a public limited company |  |
| 1. a limited company |  |
| 1. a limited liability partnership |  |
| 1. other partnership |  |
| 1. sole trader |  |
| 1. other (please specify) |  |
| 1.1.9 | Please mark the relevant boxes to indicate whether any of the following classifications apply to you | 1. Voluntary, Community and Social Enterprise (VCSE) |  |
| 1. Small or Medium Enterprise (SME) |  |
| 1. Sheltered workshop |  |
| 1. Public service mutual |  |

* 1. **Bidding model**

|  |  |
| --- | --- |
| Please mark the relevant box to indicate whether you are; | |
| 1. Bidding as a Prime Contractor and will deliver 100% of the key contract deliverables yourself. | Yes |
| 1. Bidding as a Prime Contractor and will use third parties to deliver some of the services.   If yes, please provide details of your proposed bidding model that includes members of the supply chain, the percentage of work being delivered by each sub-contractor and the key contract deliverables each sub-contractor will be responsible for. | Yes |
| 1. Bidding as Prime Contractor but will operate as a Managing Agent and will use third parties to deliver all of the services.   If yes, please provide details of your proposed bidding model that includes members of the supply chain, the percentage of work being delivered by each sub-contractor and the key contract deliverables each sub-contractor will be responsible for. | Yes |
| 1. Bidding as a consortium but not proposing to create a new legal entity.   If yes, please include details of your consortium in the next column and use a separate Appendix to explain the alternative arrangements i.e. why a new legal entity is not being created.  Please note that the Authority may require the consortium to assume a specific legal form if awarded the contract, to the extent that it is necessary for the satisfactory performance of the contract. | Yes  Consortium members  Lead member |
| 1. Bidding as a consortium and intend to create a Special Purpose Vehicle (SPV).   If yes, please include details of your consortium, current lead member and intended SPV in the next column and provide full details of the biding model using a separate Appendix. | Yes  Consortium members  Lead member  Name of Special Purpose Vehicle |

* 1. **Supplier Contact Details**

|  |  |
| --- | --- |
| Please provide Supplier contact details for any enquiries about this ITT | |
| Name |  |
| Postal address |  |
| Country |  |
| Phone |  |
| Mobile |  |
| E-mail |  |

* 1. **Licensing and registration**

|  |  |  |
| --- | --- | --- |
| Please mark the relevant box to indicate whether; | | |
| 1.4.1 | You are registered with applicable professional body.  If applicable, is your business registered with the appropriate trade or professional register(s) in the EU member state where it is established (as set out in Annex XI of directive 2014/24/EU) under the conditions laid down by that member state). | Yes / No  If Yes, please provide the registration number; |
| 1.4.2 | Is it a legal requirement in the state where you are established for you to be licensed or a member of a relevant organisation in order to provide the requirement in this procurement? | Yes / No  If Yes, please provide additional details within this box of what is required and confirmation that you have complied with this. |

# Professional Conduct

You will be excluded from the procurement process if there is evidence of convictions relating to specific criminal offences including, but not limited to, bribery, corruption, conspiracy, terrorism, fraud and money laundering, or if you have been the subject of a binding legal decision which found a breach of legal obligations to pay tax or social security obligations (except where this is disproportionate e.g. only minor amounts involved).

If you have answered “Yes” to question 2.2 on the non-payment of taxes or social security contributions, and have not paid or entered into a binding arrangement to pay the full amount, you may still avoid exclusion if only minor tax or social security contributions are unpaid or if you have not yet had time to fulfil your obligations since learning of the exact amount due. If your organisation is please provide details on a separate Appendix.

You may contact us for advice before completing this form.

**2.1 Grounds for mandatory rejection**

|  |  |  |
| --- | --- | --- |
| **Within the past five years, has your organisation (or any member of your proposed consortium, if applicable), Directors or partner or any other person who has powers of representation, decision or control been convicted of any of the following offences?** | **Please indicate your answer by marking the relevant box.** | |
| **Yes** | **No** |
| 1. conspiracy within the meaning of section 1 or 1A of the Criminal Law Act 1977 or article 9 or 9A of the Criminal Attempts and Conspiracy (Northern Ireland) Order 1983 where that conspiracy relates to participation in a criminal organisation as defined in Article 2 of Council Framework Decision 2008/841/ JHA on the fight against organised crime; |  |  |
| 1. corruption within the meaning of section 1(2) of the Public Bodies Corrupt Practices Act 1889 or section 1 of the Prevention of Corruption Act 1906; |  |  |
| 1. the common law offence of bribery; |  |  |
| 1. bribery within the meaning of sections 1, 2 or 6 of the Bribery Act 2010; or section 113 of the Representation of the People Act 983; |  |  |
| * 1. any of the following offences, where the offence relates to fraud affecting the European Communities’ financial interests as defined by Article 1 of the Convention on the protection of the financial interests of the European Communities: |  |  |
| * 1. the offence of cheating the Revenue; |  |  |
| * 1. (the offence of conspiracy to defraud; |  |  |
| * 1. fraud or theft within the meaning of the Theft Act 1968, the Theft Act (Northern Ireland) 1969, the Theft Act 1978 or the Theft (Northern Ireland) Order 1978; |  |  |
| * 1. fraudulent trading within the meaning of section 458 of the Companies Act 1985, article 451 of the Companies Northern Ireland) Order 1986 or section 993 of the Companies Act 2006; |  |  |
| * 1. fraudulent evasion within the meaning of section 170 of the Customs and Excise Management Act 1979 or section 72 of the Value Added Tax Act 1994; |  |  |
| * 1. an offence in connection with taxation in the European Union within the meaning of section 71 of the Criminal Justice Act 1993; |  |  |
| * 1. destroying, defacing or concealing of documents or procuring the execution of a valuable security within the meaning of section 20 of the Theft Act 1968 or section 19 of the Theft Act (Northern Ireland) 1969; |  |  |
| * 1. fraud within the meaning of section 2, 3 or 4 of the Fraud Act 2006; or |  |  |
| * 1. the possession of articles for use in frauds within the meaning of section 6 of the Fraud Act 2006, or the making, adapting, supplying or offering to supply articles for use in frauds within the meaning of section 7 of that Act; |  |  |
| 1. any offence listed; |  |  |
| * 1. in section 41 of the Counter Terrorism Act 2008; or |  |  |
| * 1. in Schedule 2 to that Act where the court has determined that there is a terrorist connection; |  |  |
| 1. any offence under sections 44 to 46 of the Serious Crime Act 2007 which relates to an offence covered by subparagraph (f); |  |  |
| 1. money laundering within the meaning of sections 340(11) and 415 of the Proceeds of Crime Act 2002; |  |  |
| 1. an offence in connection with the proceeds of criminal conduct within the meaning of section 93A, 93B or 93C of the Criminal Justice Act 1988 or article 45, 46 or 47 of the Proceeds of Crime (Northern Ireland) Order 1996; |  |  |
| 1. an offence under section 4 of the Asylum and Immigration (Treatment of Claimants etc.) Act 2004; |  |  |
| 1. an offence under section 59A of the Sexual Offences Act 2003; |  |  |
| 1. an offence under section 71 of the Coroners and Justice Act 2009; |  |  |
| 1. an offence in connection with the proceeds of drug trafficking within the meaning of section 49, 50 or 51 of the Drug Trafficking Act 1994; or |  |  |
| 1. any other offence within the meaning of Article 57(1) of the Public Contracts Directive; |  |  |
| * 1. as defined by the law of any jurisdiction outside England and Wales and Northern Ireland; or |  |  |
| * 1. created, after the day on which these Regulations were made, in the law of England and Wales or Northern Ireland. |  |  |

**2.2 Non payment of taxes**

|  |  |  |
| --- | --- | --- |
|  | **Please indicate your answer by marking the relevant box.** | |
| **Yes** | **No** |
| Has it been established by a judicial or administrative decision having final and binding effect in accordance with the legal provisions of any part of the United Kingdom or the legal provisions of the country in which your organisation is established (if outside the UK), that your organisation is in breach of obligations related to the payment of tax or social security contributions?  If you have answered Yes to this question, please use a separate Appendix to provide further details. Please also use this Appendix to confirm whether you have paid, or have entered into a binding arrangement with a view to paying, including, where applicable, any accrued interest and/or fines? |  |  |

**2.3 Grounds for discretionary rejection**

The Authority may exclude any Supplier who answers ‘Yes’ in any of the following situations set out in paragraphs (a) to (j) below

If you answer ‘Yes’ to any question, please set out (in a separate Annex) full details of the relevant incident and any remedial action taken subsequently. Evidence should be set out in a separate annex and include proof that you have paid or undertaken to pay compensation in respect of any damage caused by the criminal offence or misconduct, and/or clarified the facts and circumstances in a comprehensive manner by actively collaborating with the investigating authorities and demonstrated that you have taken concrete technical, organisational and personnel measures that are appropriate to prevent further criminal offences or misconduct.

The Authority will evaluate this evidence before making a decision on whether to exclude you.

The Authority may also exclude your organisation if it becomes aware by any other appropriate means that your organisation is in any of situations mentioned below.

If you have answered “Yes” to any of the questions, please provide in a separate note, a summary of the circumstances and any measures you have taken to address the issues.

|  |  |  |
| --- | --- | --- |
| **Within the past three years, please indicate if any of the following situations have applied, or currently apply, to your organisation.** | **Please indicate your answer by marking ‘X’ in the relevant box.** | |
| **Yes** | **No** |
| 1. your organisation has violated applicable obligations referred to in regulation 56 (2) of the Public Contract Regulations 2015 in the fields of environmental, social and labour law established by EU law, national law, collective agreements or by the international environmental, social and labour law provisions listed in Annex X to the Public Contracts Directive as amended from time to time; |  |  |
| 1. your organisation is bankrupt or is the subject of insolvency or winding-up proceedings, where your assets are being administered by a liquidator or by the court, where it is in an arrangement with creditors, where its business activities are suspended or it is in any analogous situation arising from a similar procedure under the laws and regulations of any State; |  |  |
| 1. your organisation is guilty of grave professional misconduct, which renders its integrity questionable; |  |  |
| 1. your organisation has entered into agreements with other economic operators aimed at distorting competition; |  |  |
| 1. your organisation has a conflict of interest within the meaning of regulation 24 of the Public Contract Regulations 2015 that cannot be effectively remedied by other, less intrusive, measures; |  |  |
| 1. the prior involvement of your organisation in the preparation of the procurement procedure has resulted in a distortion of competition, as referred to in regulation 41, that cannot be remedied by other, less intrusive, measures; |  |  |
| 1. your organisation has shown significant or persistent deficiencies in the performance of a substantive requirement under a prior public contract, a prior contract with a contracting entity, or a prior concession contract, which led to early termination of that prior contract, damages or other comparable sanctions; |  |  |
| (h) your organisation - |  |  |
| 1. has been guilty of serious misrepresentation in supplying the information required for the verification of the absence of grounds for exclusion or the fulfilment of the selection criteria; or |  |  |
| 1. has withheld such information or is not able to submit supporting documents required under regulation 59 of the Public Contract Regulations 2015; or |  |  |
| (i) your organisation has undertaken to - |  |  |
| 1. unduly influence the decision-making process of the contracting Authority, or |  |  |
| 1. obtain confidential information that may confer upon your organisation undue advantages in the procurement procedure; or |  |  |
| (j) your organisation has negligently provided misleading information that may have a material influence on decisions concerning exclusion, selection or award. |  |  |

**Conflicts of interest**

In accordance with question 2.3 (e), the Authority may exclude the Supplier if there is a conflict of interest which cannot be effectively remedied. The concept of a conflict of interest includes any situation where relevant staff members have, directly or indirectly, a financial, economic or other personal interest which might be perceived to compromise their impartiality and independence in the context of the procurement procedure.

Where there is any indication that a conflict of interest exists or may arise then it is the responsibility of the Supplier to inform the Authority, detailing the conflict in a separate Appendix. Provided that it has been carried out in a transparent manner, routine pre-market engagement carried out by the Authority should not represent a conflict of interest for the Supplier.

**Taking Account of Bidders’ Past Performance**

In accordance with question 2.3 (g), the Authority may assess the past performance of a Supplier (through a Certificate of Performance provided by a Customer or other means of evidence). The Authority may take into account any failure to discharge obligations under the previous principal relevant contracts of the Supplier completing this ITT. The Authority may also assess whether specified minimum standards for reliability for such contracts are met.

In addition, the Authority may re-assess reliability based on past performance at key stages in the procurement process (i.e. Supplier selection, tender evaluation, contract award stage etc.). Suppliers may also be asked to update the evidence they provide in this section to reflect more recent performance on new or existing contracts (or to confirm that nothing has changed).

**‘Self-cleaning’**

Any Supplier that answers ‘Yes’ to questions 2.1, 2.2 and 2.3 should provide sufficient evidence, in a separate Appendix, that provides a summary of the circumstances and any remedial action that has taken place subsequently and effectively “self cleans” the situation referred to in that question. The Supplier has to demonstrate it has taken such remedial action, to the satisfaction of the Authority in each case.

If such evidence is considered by the Authority (whose decision will be final) as sufficient, the economic operator concerned shall be allowed to continue in the procurement process.

In order for the evidence referred to above to be sufficient, the Supplier shall, as a minimum, prove that it has;

* paid or undertaken to pay compensation in respect of any damage caused by the criminal offence or misconduct;
* clarified the facts and circumstances in a comprehensive manner by actively collaborating with the investigating authorities; and
* taken concrete technical, organisational and personnel measures that are appropriate to prevent further criminal offences or misconduct.

The measures taken by the Supplier shall be evaluated taking into account the gravity and particular circumstances of the criminal offence or misconduct. Where the measures are considered by the Authority to be insufficient, the Supplier shall be given a statement of the reasons for that decision.

1. **Financial Information**

|  |  |  |
| --- | --- | --- |
| 3.1 | Please provide one of the following to demonstrate your economic/financial standing;  Please indicate your answer with an ‘X’ in the relevant box. | |
| 1. A copy of the audited accounts for the most recent two years |  |
| 1. A statement of the turnover, profit & loss account, current liabilities and assets, and cash flow for the most recent year of trading for this organisation |  |
| 1. A statement of the cash flow forecast for the current year and a bank letter outlining the current cash and credit position |  |
| 1. Alternative means of demonstrating financial status if any of the above are not available (e.g. Forecast of turnover for the current year and a statement of funding provided by the owners and/or the bank, charity accruals accounts or an alternative means of demonstrating financial status). |  |
| 3.2 | There is a minimum financial threshold set within the evaluation criteria for this ITT please self-certify by answering ‘Yes’ or ‘No’ that your company turnover is more than two times the value of this contract.  Suppliers should note, the anticipated value of this contract is less than or equal to £165,000 and as such your turnover must be greater than £330,000 | Yes / No |
| 3.3 | Are you are part of a wider group (e.g. a subsidiary of a holding/parent company)?  If yes, please provide;   1. Name of the organisation 2. Relationship to the Supplier completing the ITT 3. Ultimate / parent company accounts if available (most recent two years). 4. An indication of whether the Ultimate / parent willing to provide a guarantee if necessary? If no, would you be able to obtain a guarantee elsewhere (e.g from a bank?) | Yes / No |

1. **Insurance**

|  |  |  |
| --- | --- | --- |
| 4.1 | Please self-certify whether you already have, or can commit to obtain, prior to the commencement of the contract, the levels of insurance cover indicated below:   * Employer’s (Compulsory) Liability Insurance = £5 million * Public Liability Insurance = £5 million * Professional Indemnity Insurance = £5 million   \*It is a legal requirement that all companies hold Employer’s (Compulsory) Liability Insurance of £5 million as a minimum. Please note this requirement is not applicable to Sole Traders. | Yes / No |

1. **Evidence of previous experience**

|  |  |  |
| --- | --- | --- |
| 5.1 | Bidders are to provide demonstrable experience of similar projects completed to a high design standard, including the delivery up to RIBA stage 4 within the arts / culture / heritage sector and to include experience of individual team members outlined in CV’s.  This experience should include heritage restoration and interpretation | Pass / Fail |

## **Part B: Professional and Technical ability**

Suppliers should note that the questions within the following section have a page / word] limit, this is individually specified within each question. Any information provided that is in excess of the stated page / word limit will **not** be evaluated.

**Your responses must be relevant and specific to the requirements of this contract, please do not send marketing material.**

Consortia bids should provide relevant examples of where the consortium has delivered similar requirements; if this is not possible (e.g. the consortium is newly formed or a Special Purpose Vehicle will be created for this contract) then three separate examples should be provided between the principal member(s) of the proposed consortium or Special Purpose Vehicle (three examples are not required from each member).

Where the Supplier is a Special Purpose Vehicle, or a managing agent not intending to be the main provider of the supplies or services, the information requested should be provided in respect of the principal intended provider(s) or sub-contractor(s) who will deliver the supplies and services.

**Method Statement 1: Relevant experience and contract examples**

**4 page limit - Pass / Fail**

Please provide details of up to three contracts, in any combination from either the public or private sector, that are relevant to the Authority’s requirement. Contracts for supplies or services should have been performed during the past three years. Works contracts may be from the past five years, and VCSEs may include samples of grant funded work.

The named customer contact provided should be prepared to provide written evidence to the Authority to confirm the accuracy of the information provided below.

Consortia bids should provide relevant examples of where the consortium has delivered similar requirements; if this is not possible (e.g. the consortium is newly formed or a Special Purpose Vehicle will be created for this contract) then three separate examples should be provided between the principal member(s) of the proposed consortium or Special Purpose Vehicle (three examples are not required from each member).

Where the Supplier is a Special Purpose Vehicle, or a managing agent not intending to be the main provider of the supplies or services, the information requested should be provided in respect of the principal intended provider(s) or sub-contractor(s) who will deliver the supplies and services.

**Please note, a template for your responses to the questions below is provided in Appendix A.**

**Method Statement 2: [Understanding of the Project] 15%**

**1200 word limit**

Bidders are to demonstrate their understanding of the project and the needs of the Council, the citizens of the borough and wider users of The Canons

**Method Statement 3: Project delivery plan and organisation of the works.] 15%**

**4 page limit**

Bidders are to demonstrate how they will organise and manage how the project will be delivered including an indicative project timetable.

**Method Statement 4: Staffing**

**Weighting 10% word limit 1000**

Bidders are to show an organisational chart for this project showing staff involved, their responsibilities and how they will allocate appropriate and competent resources to this project

Bidders must explain how they will ensure that this project is adequately resourced at all times.

**Method statement 5: Communication**

**Weighting 10% word limit 1000**

Bidders are to explain what actions they will take to ensure that communication will be effective between any and all parties including other contractors and the Council, and how they will set out to achieve smooth progress and running of the project.

**Method Statement 6: Approach to engaging the community**

**Weighting 10% word limit 1000**

Bidders are to set out how and when they will identify and engage with the various community groups and other external interested parties.

**Method Statement 7: Identifying and Managing Risks**

**Weighting 10% word limit 1000**

Bidders are to set out and perceived risks with this project, and suggest how they would monitor and overcome these. In addition, bidders should set out a strategy for risk identification and management during the life of the project.

1. Schedule 1 Form of Tender

|  |
| --- |
| **TO:** London Borough Of Merton |
| **DATE:** [Insert date] |
| **PROVISION OF:** [insert contract title] |
| **REFERENCE NUMBER:** [insert contract reference] |
| I/We [INSERT NAME[S]] the undersigned, having examined the ITT and all other schedules, do hereby offer to provide [insert contract title] as specified in those documents and in accordance with the attached documentation to the Council commencing [insert contract start date] and continuing for the period specified in the Contract.  I/We agree to keep this Tender open for acceptance for a period of ninety (90) days. If this offer is accepted, we will execute such documents in the form of the Contract within twenty-eight (28) days of being called on to do so.  I/We agree that before executing the Contract (and associated schedules) substantially in the form set out in the ITT, the formal acceptance of this Tender in writing by the Council or such parts as may be specified, together with the contract documents attached hereto shall comprise a binding contract between the Council and us.  I/We further agree with the Council in legally binding terms to comply with the provisions of confidentiality as set out in the ITT.  I/We warrant that I/We have all requisite authority to sign this Tender and confirm that I/We have complied with all the requirements of the ITT. |

1. Schedule 2 Non Collusive Tender and Declaration of Interest

**Non-Collusive Tender**

I/We certify that we have submitted a bona fide tender and that we will not fix or adjust the amount of any tender by or under or in accordance with any agreement or arrangement with any other person. We also certify that we will not at any time before the hour and date specified for the return of the tenders;

1. communicate to any person the amount of the proposed tender, except where the disclosure, in confidence, of the approximate amount of the tender is necessary to obtain insurance premium quotations required for the preparation of the tender.
2. enter into any agreement or arrangement with any other person, whether that s/he shall refrain from tendering on this or any other contract, or as to the amount of any tender to be submitted or any other reason amounting to price-fixing or membership of a cartel.
3. offer to pay or give or agree to pay or give any sum of money or any consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other tender or proposed tender for this or any other contract or any act or thing of the sort described above.
4. In this declaration, the word ‘person’ includes any persons or anybody or association, corporate or incorporate, and any agreement or arrangement includes any such transaction, formal or informal, whether legally binding or not.

**Declaration of Interest**

|  |  |
| --- | --- |
| **FOR EACH OF THE FOLLOWING,** please state whether yourself, other Directors, Partners or any staff have been or are currently: | **Answer** |
| Employed by the London Borough of Merton | Yes / No  If Yes, please provide additional details within this box |
| A Councillor at the London Borough of Merton | Yes / No  If Yes, please provide additional details within this box |
| In any actual or perceived conflict of interest that may arise as a result of participating in this procurement process | Yes / No  If Yes, please provide additional details within this box |

You may answer on a separate sheet if you require more space. If not applicable please write N/A for the above 3 questions.

Commercially Sensitive Information

**Commercially sensitive information**

I declare that I wish the following information to be designated as Commercially Sensitive and is appended to the Contract at Schedule [NUMBER].

|  |
| --- |
|  |

The reason(s) it is considered that this information should be exempt under Freedom of Information Act 2000 is:

|  |
| --- |
|  |

The period of time for which it is considered this information should be exempt is [until award of contract **OR** during the period of the contract **OR** for a period of [NUMBER] years until [MONTH], [YEAR]].

|  |
| --- |
|  |

1. Signatures

I/We the undersigned have read and agreed to the aforementioned declarations and agreements directly associated with the requirements contained within this ITT document.

|  |  |
| --- | --- |
| **SIGNED BY THE TENDERER (Authorised Person)** | |
| Signature |  |
| Name |  |
| Role in organisation |  |
| Date |  |

|  |  |
| --- | --- |
| **WITNESS** |  |
| Signature |  |
| Name |  |
| Address |  |
| Occupation |  |
| Date |  |