

HERITAGE ACTION ZONE

**INVITATION TO QUOTE**

**PUBLISH DATE: Monday 2nd May 2022**

**Heritage Consultant for Gosport Lines Conservation Area Appraisal and Management Plan**

**RESPONSE DEADLINE: 12 NOON 31st May 2022**

1. **CONTENTS AND INTRODUCTION** 
   1. **Contents of this ITQ**

This Invitation to Quote (ITQ) comprises this main ITQ document together with:

1. Quotation Response Document
2. Schedule 1 – Commercially Sensitive Information
3. Schedule 2 – Form of Quote
   1. **Introduction**

This ITQ contains further information about the procurement process, the services, and the assessment questions for Respondents to complete. Each Respondent submission should be detailed enough to allow the Council to make an informed selection of the most appropriate quote.

Gosport Borough Council, with financial support and advice from Historic England, is seeking Quotes to complete a conservation area appraisal, including management plan within their Borough.

**2 PROJECT SUMMARY**

**2.1**

In 2019 Gosport Borough Council were awarded a Borough wide Heritage Action Zone by Historic England. It is a five year programme of work to conclude in 2024. The HAZ is delivered in partnership with Historic England, Defence Infrastructure Organisation, Gosport Society and Hampshire County Council. A Partnership Team of two representatives from each Partner organisation make up the HAZ Partnership Team mentioned in the Project Brief.

The aim of the project is to produce a Conservation Area Appraisal and Management Document to characterise the historic Gosport Lines and as an opportunity to aid awareness and better understanding of their existence and the role in shaping Gosport’s history and character. Many of the aspects of the Lines are unique attributes that when better understood, will inspire pride in sense of place. A Conservation Area Appraisal and Management Document will ensure the above aims are met.

The successful consultant will be required to deliver a Conservation Area Appraisal report within nine months. They will be required to review a number of sources held by Historic England, undertake their own research and survey, as well as engaging with communities with interest in the Gosport Lines area – potentially through either in person or remote (online) engagement workshops, interviews or set tasks.

**3 SCOPE AND SPECIFICATION**

**3.1 Scope**

The project will produce an historic characterisation of the Lines, firstly in the form of an initial, brief assessment report, to be followed by a draft Appraisal and Management Plan, as set out below.The scope of the project covers a study area which extends from Bastion No.1 in the south to Priddy’s Hard in the north.

The study area is in multiple ownerships, including private businesses, residential property owners, The Church of England, as well as the public sector (including Ministry of Defence and Borough Council). There is strong public interest in the area with both the Gosport Society and local interest groups providing public voices. A large part of the study area is public open space that makes an important contribution to the amenity of local people and is an attractor for visitors. Similarly, expanses of the area are not currently available to the public (fortifications north of Mumby Road – Scheduled Monument), though future public access remains an aspiration.

3.2

The development of the Conservation Area Appraisal and Management Plan is time critical to inform further stages of the Heritage Action Zone programme. Consultants will need to demonstrate their ability to deliver the appraisal within the timescale, including providing evidence of their organisational resilience and quality assurance measures. The report will be prepared to a second draft stage allowing the Council to undertake public consultation by end of **March 2023.**

## **3.3 Specification**

The consultant will receive and review data from Historic England and Gosport Borough Council and identify any data gaps they need to fill. The consultant will then attend a virtual inception meeting with the Heritage Action Zone Partners and agree where data gaps lie that they will need to fill and their approach, including any alterations the consultant may wish to suggest for the boundary of the study area or integration of later project steps. This will be set out in an inception report.

It is expected that the consultants will engage with relevant stakeholders to access information and understand the heritage values of the study area and other ways in which the character or appearance may be considered desirable to preserve or enhance. Proposals will need to set out how stakeholders including residents, landowners, interest groups will be engaged including proposals for meetings, workshops, questionnaire survey, tasks or interviews.

It is expected that following research (including literature review), survey and engagement the consultant will prepare a first draft version of the designation assessment report for review by the Borough Council and, following one round of amendment, by the Heritage Action Zone Partnership members and the appropriate Ward Councillors for the area covered by the study. The latter will be consulted through an online meeting. Having collected feedback from this forum the consultant will agree amendments with the Borough Council via the Heritage Action Zone Programme Manager and produce a Second Draft of the appraisal in a format suitable for public consultation and editable by the Borough Council.

All engagement activities must be designed with awareness of and inclusive of the needs of people with protected characteristics as defined by Chapter 1 of the Equalities Act 2010. It should support the Borough Council in delivering its duties to “… reduce the inequalities of outcome which result from socio-economic disadvantage” required by Section 1 of the Act.

**4 INSURANCE**

The successful Respondent will maintain the following insurance cover for the duration of the commission and provide evidence of cover to the Council at any time when requested by the GBC.

|  |  |
| --- | --- |
| **Insurance:** | **Minimum value required** |
| Public Liability | £5 million |
| Professional Indemnity | £5 million |

Appropriate COVID-19 guidelines must be adhered to for the duration of the work.

**5 TIMETABLE**

The key dates for this procurement are as follows:

|  |  |
| --- | --- |
| **Event** | **Date** |
| Issue Invitation to Quote | 2 May 2022 |
| Deadline for receipt of clarifications | 11 May 2022 |
| **Deadline for receipt of Quotes** | **31 May 2022** |
| Evaluation of Quotes | 6 June 2022 |
| Notification of contract award decision | 8 June 2022 |
| **Target service commencement date** | **13 June 2022** |
| **Contract completion date** | **31 March 2023** |

Any changes to the procurement timetable shall be notified to all Respondents as soon as practicable.

**6 INSTRUCTIONS ON COMPLETING THE QUOTE**

**6.1 Submitting a Quote**

Quotes must be uploaded via the South East Business Portal also known as Proactis.

The link to the portal is: <https://sebp.due-north.com/>

Your Quote must include:

* Completed ITQ response document
* Schedule 1 – Commercially Sensitive Information
* Schedule 2 – Form of Quote

Quotes must be submitted in the manner prescribed in this document, no later than the deadline set out in the timetable above.

Any Quote received after the deadline shall not be opened or considered. GBC may, however, in its own absolute discretion extend the deadline and in such circumstances the GBC will notify all Respondents of any change.

Any questions relating to this ITQ must be raised **only** as a clarification via the messaging function on the South East Business Portal/Proactis (link above). GBC will not enter into exclusive discussions regarding the requirements of this ITQ with potential providers.

To ensure a transparent and consistent approach all clarifications statements will be made available to all providers apart from where commercial sensitivity exists.

Clarifications in relation to this ITQ must be raised within the timescales provided.

Respondents are required to respond to requests for clarification as requested and no later than within 3 working days. If in the opinion of GBC the Respondent fails to provide an adequate response to one or more points of clarification, the Respondent may be excluded from progressing further in the process.

GBC reserve the right to decline to make an award for the service requirements, or to abandon or cancel the ITQ process. GBC will not be responsible for any costs or expenses incurred as a result of following this course of action.

Any costs incurred by the Respondent in responding to this ITQ or in support of activities associated with the response to this opportunity are to be borne by themselves and are not reimbursable by GBC.

**6.2** **Formalities**

 The following requirements must be adhered to when submitting Quotes:

1. A detailed timeline and milestones for the completion of the work must be included
2. A table of Consultants individual time to be spent on the project, day rate and overall cost must be provided
3. The Quote must be in English and drafted in accordance with the drafting guidance set out in this ITQ.
4. The Quote must only include what is requested in this ITQ and submitted using the ITQ response document

The Quote must be clear, concise and complete. GBC reserves the right to mark a Respondent down or exclude them from the procurement if its Quote contains any ambiguities, caveats or lacks clarity. Respondents should submit only such information as is necessary to respond effectively to this ITQ. Quotes will be evaluated on the basis of information submitted by the Deadline.

The Respondent must download, complete and include a duly executed Form of Quote (Schedule 2)

Where the Respondent is a company, the Quote must be signed by a duly authorised representative of that company. Where the Respondent is a consortium, the Quote must be signed by the lead authorised representative of the consortium, which organisation shall be responsible for the performance of the Contract. In the case of a partnership, all the partners should sign or, alternatively, one only may sign, in which case he must have and should state that he has Council to sign on behalf of the other partner(s). The names of all the partners should be given in full together with the trading name of the partnership. In the case of a sole trader, s/he should sign and give his/her name in full together with the name under which s/he is trading.

**6.3** **Warnings and disclaimers**

While the information contained in this ITQ is believed to be correct at the time of issue, neither GBC, its advisors, nor any other awarding authorities will accept any liability for its accuracy, adequacy or completeness, nor will any express or implied warranty be given. This exclusion extends to liability in relation to any statement, opinion or conclusion contained in or any omission from, this ITQ (including its appendices) and in respect of any other written or oral communication transmitted (or otherwise made available) to any Respondents. This exclusion does not extend to any fraudulent misrepresentation made by or on behalf of the Council.

If a Respondent proposes to enter into a Contract with the Council, it must rely on its own enquiries and on the terms and conditions set out in the Contract(s) (as and when finally executed), subject to the limitations and restrictions specified in it.

Neither the issue of this ITQ, nor any of the information presented in it, should be regarded as a commitment or representation on the part of the Council (or any other person) to enter into a contractual arrangement.

**6.4 Confidentiality and Freedom of Information**

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

As a public body, GBC is subject to the provisions of the Freedom of Information Act 2000 (FOIA) in respect of information it holds (including third-party information). Any member of the public or other interested party may make a request for information.

Respondents should be aware that, in compliance with its transparency obligations, the Council routinely publishes details of its contract(s), including the contract values and the identities of its suppliers on its website without consulting the provider of that information.

GBC shall treat all Respondents’ responses as confidential during the procurement process. Requests for information received following the procurement process shall be considered on a case-by-case basis, applying the principles of FOIA, which permits certain information to be withheld, for example where disclosure would be prejudicial to a party’s commercial interests, and in accordance with GBC’s transparency obligations.

Therefore, Respondents are responsible for ensuring that any confidential or commercially sensitive information, the disclosure of which would be likely to diminish the Respondents competitive edge, has been clearly identified to GBC in the template provided at Schedule 1.

**6.5** **Publicity**

No publicity regarding the Services or the award of any Contract will be permitted unless and until GBC has given express written consent to the relevant communication. For example, no statements may be made to the media regarding the nature of any Quote, its contents or any proposals relating to it without the prior written consent of GBC.

**6.6** **Respondent conduct and conflicts of interest**

Any attempt by Respondents or their advisors to influence the contract award process in any way may result in the Respondent being disqualified. Specifically, Respondents shall not directly or indirectly at any time:

1. Devise or amend the content of their Quote in accordance with any agreement or arrangement with any other person, other than in good faith with a person who is a proposed partner, supplier, or provider of finance.
2. Enter into any agreement or arrangement with any other person as to the form or content of any other Quote, or offer to pay any sum of money or valuable consideration to any person to effect changes to the form or content of any other Quote.
3. Enter into any agreement or arrangement with any other person that has the effect of prohibiting or excluding that person from submitting a Quote.
4. Canvass GBC or any employees or agents of the Council in relation to this procurement.
5. Attempt to obtain information from any of the employees or agents of the Council or their advisors concerning another Respondent or Quote.

Respondents are responsible for ensuring that no conflicts of interest exist between the Respondent and its advisers, and GBC and its advisors. Any Respondent who fails to comply with this requirement may be disqualified from the procurement at the discretion of GBC.

**6.7** **Council’s rights**

GBC reserves the right to:

1. Waive or change the requirements of this ITQ from time to time without prior (or any) notice being given by GBC.
2. Seek clarification or documents in respect of a Respondent’s submission.
3. Disqualify any Respondent that does not submit a compliant Quote in accordance with the instructions in this ITQ.
4. Disqualify any Respondent that is guilty of serious misrepresentation in relation to its Quote, expression of interest, or the Invitation to Quote process.
5. Withdraw this ITQ at any time, or to re-invite Quotations on the same or any alternative basis.
6. 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

**6.8** **Bid costs**

GBC will not be liable for any bid costs, expenditure, work or effort incurred by a Respondent in proceeding with or participating in this procurement, including if the procurement process is terminated or amended by the Council.

**7. EVALUATION AND SCORING**

**7.1** **Award Criteria and Evaluation Criteria**

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

1. 75% technical or quality.
2. 25% cost.

Scores are arrived at following the application of the Evaluation Criteria (Evaluation **Criteria**) set out below to the Respondent’s Quote.

Respondents are required to submit a Quote strictly in accordance with the requirements set out in this ITQ, to ensure GBC has the correct information to make the evaluation. Evasive, unclear or hedged Quotes may be discounted in evaluation and may, at the Council’s discretion, be taken as a rejection by the Respondent of the terms set out in this ITQ.

The Quote Evaluation Model showing the Evaluation Criteria and the maximum scores attributable to them is set out below.

|  |  |  |
| --- | --- | --- |
| **Criteria** | | **Weighting** |
| *1*  *1a*  *1b*  *1c*  *1d*  *1e*  *1f* | **Response to specification**  Quotes will be evaluated in accordance with the scoring model set out at Section 7 of the ITQ as to the proposed method for delivery of the Commission in accordance with this ITQ including:  Structure and experience of project team  Timetable and key milestones for project delivery  Overall approach to delivering the specification  Method for carrying out communications  Arrangements for managing working relationships  Method for monitoring of performance and quality assurance | **75%**  **5%**  **10%**  **40%**  **10%**  **5%**  **5%** |

|  |  |  |
| --- | --- | --- |
| **Criteria** | | **Weighting** |
| *2*  *2a* | **Quote Sum**  Quote sum will be evaluated by the application of the formula in 7.3 of the ITQ  A schedule of costs itemised by work item must be provided by the Respondent with all prices stated in pounds sterling and exclusive of VAT. | **25%** |

**7.2** **Quality Evaluation**

**Technical or quality evaluation**

The technical evaluation will be scored in accordance with the table below.

| **Assessment** | **Allocated Score** |
| --- | --- |
| **Very Poor** – completely fails to demonstrate that it will meet the criteria | 0 |
| **Poor** – some, but very limited evidence of that it will meet the criteria | 1 |
| **Satisfactory** – provides evidence that it will meet the criteria sufficiently | 2 |
| **Good** – shows attributes in a number of areas that are in excess of the criteria | 3 |
| **Very good** –in excess of the criteria in all areas | 4 |

Quality will be scored in accordance with the methodology referred to in the table below. A formula will then be applied to the total score and the best quality proposal will be awarded maximum points. All other proposals will be scored in proportion to the best quality complaint proposal.

Example:

|  |  |  |
| --- | --- | --- |
| **Quote** | **Respondent A** | **Respondent B** |
| Points awarded | 24 | 18 |
| Total score | Weighting/max score available x points awarded  = **75** | Weighting/max score available x points awarded  **= 54** |

7.3 Price evaluation

Submitted prices must remain open for a period of 90 days from the closing date.

Respondents are required to provide a total price for all the services detailed in the submission to GBC’s specification.

The price will be evaluated in accordance to the scoring methodology referred to in the table below. A formula will then be applied to the total cost and the most competitively priced proposal will be awarded maximum points. All other proposals will be scored in proportion to the most competitively priced complaint proposal.

Example:

|  |  |  |
| --- | --- | --- |
| **Quote** | **Respondent A** | **Respondent B** |
| Price | £15,000 | £17,000 |
| Score | Lowest price / bid price x weighting  **= 25** | Lowest price / bid price x weighting  **= 22** |

8. CONTRACT AWARD

The Council will award the Contract on the basis of the Quote submitted and will be based upon all of the quotation documents issued by the Council including the Council’s standard terms and conditions.

Contract award under this procurement will be awarded based on the offer that is the most advantageous to GBC.

The Respondent that achieves the highest total score will be awarded the Contract.

In striving for a high standard of quality / service any quotation which achieves an unsatisfactory score (0) in any of the quality submissions will be rejected.

All bidders will be notified of the outcome of their submission via Proactis.