

Holy Trinity Hastings

**Brief for Commissioned Work:
Quantity Surveyor**

April 2024



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1.0 Introducing the Project

1.1 Summary

This Brief sets out the requirements for the commissioning of a Quantity Surveyor for the Heritage@HTH project.

1.2 Background

Holy Trinity Hastings (HTH) is an Anglican church located in the Castle Ward of Hastings.

Holy Trinity Church is listed grade II* being a particularly important building of national architectural and cultural significance. HTH was designed by the nationally renowned Gothic Revival architect, SS Teulon. It is a large and ornate building on a relatively constrained triangular 'Trinity Triangle' town centre site, which was the original location of the 19th century America Ground settlement. A polygonal vestry was added by another important architect, Romaine Walker in 1892. The interior has a large cathedral like quality containing several highly decorative fixtures and fittings by some of the best ecclesiastical artists of the time, including carvings by Thomas Earp, the pulpit by Romaine Walker and some windows by the acclaimed stained-glass artists, Clayton and Bell and Charles Eamer Kempe.

Importantly, the Church holds Edward Johnston's Missal, described as the finest illuminated manuscript since the Reformation and of Exceptional Significance: National and International Importance.

A unique War Memorial comprises two sets of five life sized allegorical figures painted on gold backgrounds with a central bronze and enamel triptych that bears the names of those killed in the First World War. It is understood the paintings were done by students of the Hastings School of Art under Philip Cole's direction.

The Church also has a set of parish magazines dating from 1892 to 2014, which can inform us of the history of the Church particularly, but also of Hastings and the country more widely over that period.

Hastings ranks as the most deprived lower tier local authority in the South East, Transport for South East area and South East Local Enterprise Partnership by almost all measures. Nationally, it ranks as 13th most deprived in terms of average rank in the Indices of Deprivation 2019, out of 317 lower tier local authorities. In seven of 11 deprivation indicators, problems in Hastings have worsened since 2015. Hastings was the 20th most deprived area in 2015, but the 2019 figures show the things have worsened, making Hastings the most deprived local council area in the South East of England by far. The majority of the East Sussex's deprived neighbourhoods are located in Hastings, where 16 out of 53 wards (30%) rank in the most deprived decile nationally.

Castle ward, where HTH is located, is the third most deprived ward overall in all of East Sussex. In the 'crime' deprivation indicator, Castle ward ranks first in the county. Overall, 37 LSOAs in Hastings rank as relatively more deprived in 2019, compared to 2015. 43% of Hastings LSOAs are among the most deprived 20% nationally. The Income Deprivation Affecting Children Index (IDACI) shows that 27% of children in Hastings are living in families affected by income deprivation. 13 LSOAs in Hastings fall into the 10% most deprived nationally on this measure, including Castle ward. 30% of LSOAs in the county have a higher proportion of children living in income deprived families than the national average.

Yet in this context the HTH church community has grown from 20 in 2014 to around 530 weekly visitors in 2023, including some of the most marginalised people in the town.

Since arriving at the nearly defunct church in 2014, the current Church leadership team has re-established a community of over 530 weekly visitors, including some of the most marginalised. A wide range of community outreach projects on offer provides for those affected by poverty, those who face loneliness, social isolation and economic hardship. They also run a hugely popular weekly Tots and Me session and for children aged 0-4 and their carers, and offer weekly activities for teens to help grow confidence, and develop leadership skills through a range of games, creative activities and cooking together. During the summer months, we also run a weekly series of free Lunchtime Concerts, where we highlight the immense talent of our local musicians.

Economically, HTH draws footfall to the Trinity Triangle area to support the forty hospitality and retail businesses. This new project has received 'pump-priming' support from Trinity Triangle Heritage Action Zone. Historic England and Hastings Borough Council are supportive because they see its potential to leverage HTH's unique heritage to accelerate local rejuvenation.

HTH has been successful in securing a Development Phase grant from NLHF to develop a project.

1.2.1 Vision For the Project

The Project's vision is to enable people to discover the many stories and treasures of Holy Trinity Hastings; stories linked to people from the past who created the Church we see today and those who continue to make it the vibrant and dynamic place it has become: a place of worship and a community hub serving the people of Hastings. We hope that engagement with our church, our treasures and our heritage, will encourage people to discover their own purpose and place within this community and create a renewed sense of pride and hope engendered by our wonderful building.

Our Core Aims:

- To ensure that our congregation, users, visitors, and our diverse community understand and appreciate the significant role that Holy Trinity Hastings has played in the development of Hastings.

- To raise the profile of HTH Church as one of the most important heritage buildings in Hastings and thereby attract and welcome new visitors to discover the mission of the church through the stories and people, the treasures and architecture of this special place.
- To work with hard to reach and under-represented sections of the local community that are relevant to our work in Hastings and are currently excluded from engaging with their heritage through lack of awareness, opportunity or resource.

1.2.2 The Project

The project will allow a fully restored and upgraded Holy Trinity Hastings Church (HTH) to be the central hub of a substantial community activity programme, which will include imaginative and engaging heritage interpretation and education activities and a programme of events, embracing the 'Trinity Triangle's' diverse communities and reaching out to new ones. Together, HTH and the residents will be able to celebrate the most ambitious heritage restoration and community involvement project in its history, revitalising this unique area as an upgraded tourist destination.

We will restore the Grade II* Listed Holy Trinity Church, removing it from Historic England's Heritage at Risk Register. We will make improvements to the interior of the building, allowing more flexible use and implementing energy efficiency/sustainability measures. We will create robust Business and Management Plans for ongoing project sustainability.

Members of our community will be not just observers of the project, but creators too, empowered to contribute to a unique ongoing vision of what HTH will offer and represent to them. A series of co-created projects will be initiated with the aim of increasing participation and providing upskilling by researching, recording and making our heritage and stories accessible. We will focus activities on young people, but also invite the whole community to discover our treasures together.

We will establish the Trinity Triangle as a premier visitor attraction, increasing visitors by 30%.

We will create a vibrant range of activities, including projects, exhibitions and events, which will:

- Create a sense of pride in place for residents through historical research and interpretation, and engagement projects.
- Widen participation of new users, in particular young people, offering respite activities for young carers and an ambitious plan of skills improvement and learning opportunities for the young people at college.
- Tackle social isolation affecting older people living in the area.
- Strengthen existing volunteer opportunities by upskilling and supporting the current volunteers in creating delivering new projects and recruiting new volunteers to gain valuable experience.
- Significantly increase the footfall for the local businesses in the Trinity Triangle.

- Be delivered through local partnerships with front line-service providers, education providers, and heritage organisations.

Environmental Sustainability

In order to ensure the environmental and financial sustainability of Holy Trinity Church, the 2030 target of Carbon zero set by the Church of England will to be taken seriously in our project delivery.

Holy Trinity commissioned an Energy Audit and Sustainability Assessment, which concluded that the carbon emissions from heating are the biggest single factor in the carbon footprint of the Church. To address this issue, new efficient boilers running a low temperature underfloor heating system will be installed, which will radically reduce gas consumption. The boilers will have the ability to be converted to multi fuel use as and when these become readily available. The heating system will be zoned so areas not requiring heating can be turned off when not in use.

We are also installing a new lighting and electrical power system, which will use LED and other technologies to significantly reduce electrical consumption. Ancillary areas will have movement sensors on them so we can ensure energy is only used when the areas are occupied.

All items used for the interpretation of the Church and our treasures will be designed with sustainability in mind. Materials used for showcases, LED lighting will follow best practice in sustainability. By not having fixed interpretation panels we will reduce the amount of material used and instead rely on digital interpretation, downloaded to phones or delivered via listening posts. Using 'Julies Bicycle' resource pack designed for ACE we will follow their advice on sustainable display within museum and heritage settings.

We are committed to appointing local contractors, where possible and using local resources, in an effort to reduce travel miles for goods and services during the capital project.

During the development phase, we will join Fit for the Future, to ensure that all opportunities to address the project's environmental impacts have been considered and implemented, as appropriate.

Capital Works

The heritage of Grade II* listed Gothic Revival building of Holy Trinity Hastings (HTH) will be considerably enhanced by the successful delivery of this project. Significant repairs to the building's external sandstone walls, identified as urgent in the 2023 Quinquennial Report, will be addressed, leading to HTH being removed from Historic England's Heritage at Risk Register. The Quinquennial Report shows that many areas to the exterior of the church building have been subject to erosion and require urgent repair to avoid water penetration and potential failure. Additionally, stone has fallen from high levels of the church building, fortunately without causing any harm to passers-by below.

Upgrades to the interior of the building will allow HTH to better realise its community potential as the largest interior space in this area of Hastings, and implement energy efficiency measures.

In order to safeguard the Church, and prevent the imminent loss of historic fabric, the following capital works need to be undertaken:

Externally

- The careful removal and then replacement of carved Caen Stone and Bath Stone elements where necessary for the structural integrity of the building, and their replacement with new Caen Stone and Bath Stone, carefully selected from the best beds available to ensure the best longevity for the repairs. This work will require the structural support of significant elements of the building to allow masonry to be removed and replaced, and significant work in re-carving lost details.
- Carry out stone, mortar and glass repairs to windows and doors to make safe and water tight.
- Remove inappropriate cement repairs to stone work and replace.
- The careful removal of the main stained-glass windows in the eastern windows, to allow the masonry repairs to be undertaken, and their conservation, repair and reinstatement.
- Carry out repairs to roof, coping and valley gutter.
- Carry out repointing work as required.
- The leaded lights and casements in the vestry, west elevation and south elevation will also need to be removed to allow masonry repairs, but in many instances will also have to be completely rebuilt because of the failure of the lead comes.
- The replacement of failed guttering and rain water goods to cope with the modern climate, particularly on the south elevation, and the repairs of the downpipes particularly on the northern elevation.

Internally

- With regards the internal boarded floors the state of decay and the extent of repairs required is such that it is best for the building to look at a complete relaying of the floor and repair of the structure. This means an underfloor heating system can be installed, which will significantly reduce the carbon footprint of the building and assist with the desire to make the building as energy efficient as possible. This work will also make the Nave level.
- In addition, to ensure the environmental and financial sustainability of Holy Trinity Church, the 2030 target of Carbon zero set by the Church of England needs to be taken seriously. This means a new lighting and electrical power installation needs to be installed, which will use LED and other technologies to significantly reduce electrical consumption, and new efficient boilers running a low temperature underfloor heating system needs to be installed. This will radically reduce gas consumption, and the boilers will have the ability to be converted to multi fuel use as and when these become readily available.
- The provision of new WCs within the church.
- Restoration of the War Memorial located inside the building. This will include cleaning tests, surface cleaning, stabilisation, timber repair, retouching, detachment of canvas paintings, repair or replacement of the supports, canvas repairs and regilding.

Interpretation

- Edward Johnston's Missal, described as the finest illuminated manuscript since the Reformation and of Exceptional Significance: National and International Importance will be assessed by conservators and a bespoke showcase for the Missal will be constructed, which will protect it from deterioration and display it with accompanying interpretation.
- A permanent mobile display on wheels to acknowledge the work done by volunteers on the project.
- As you will see from this Brief, HTH has a really rich set of stories to tell, and we are keen to tell these through some interpretation as well as through the Activity Plan. The church will continue to function primarily as a place of worship and for community based activities but it will open its doors to visitors to enable them to learn more about its heritage. There will be community consultation during the Development Phase to guide the decisions about the other fixed interpretation that will be created for the church.

Training

There is a real shortage of skilled and experienced conservation professionals. The project at Holy Trinity Church presents an outstanding opportunity to allow young professionals and we expect each consultant to support the training of young people in the delivery of this project. Training, apprenticeships and work experience will also be built into the requirements for Consultants and Contractors. As part of the procurement process for each Consultant we are asking how they can support the training of young people in relation to their profession. This will be pulled together to contribute to the Activity Plan and coordinated in order to maximise its impact.

Activities

The project Heritage@HTH is aimed at a diverse audience, which will be both in-person users but also a digital audience. We estimate 2,000 individual users will access the fascinating history of the Church and its significant contents through our improved website, displaying the results of volunteer research projects, an important part of our Activity Plan. We anticipate 250 volunteers and participants every year will work with us on our Activity Plan which will run alongside our vital reconstruction work. The ideas below were developed to inform the Round One application to NLHF. These will be explored, tested and developed into an Activity Plan during the Development Phase.

Through our current community support programme, we are well aware of the significant challenges faced by the Hastings community. Hastings is currently ranked as the 13th most deprived borough in England and worst in the whole of the SE. A strong part of our vision for this project is to support those within Hastings who are impacted by poverty as well as high levels of unemployment particularly amongst young people. 27% of children in Hastings are living in families impacted by income deprivation, in comparison with 1 in 10 in the neighbouring borough of Wealden. The percentage increase in young people involved in unpaid caring duties is larger than anywhere else in the SE. We will focus the delivery of

benefits from our project on young people, using our project to increase their life chances. It is important for young people to understand the place and heritage they live with, engendering a sense of understanding and belonging.

We will provide enhanced volunteering opportunities with training and skill development for a wide range of participants, but particularly young people. The Church has an existing group of 130 volunteers, and we anticipate recruiting 50 young volunteers, together they will be encouraged to learn new skills in:

- archive research – working with our important collection of parish magazines dating from 1891.
- oral history recording
- interpretation planning
- guiding
- practical conservation

Our project will give us an increased need for volunteers to undertake our activity plan and we will target young volunteers to work with us on construction, conservation, digital content, film making, photography, oral history interviewing and recording. By involving young people in projects with tangible outcomes they can improve life skills, gain confidence and a sense of pride in their achievements, which will live on in the newly restored Church, with its greatly improved visitor offer.

We will work with Care for the Carers East Sussex to involve young carers in a way which is possible for them, and will work with East Sussex College to offer construction apprenticeships and practical work experience for photography and film making students, opening up new career paths and enhancing employability. We will ensure participants are not financially disadvantaged by participation by ensuring our budget is sufficient to meet their expenses. We also plan to offer paid work placements for some young people.

We will ensure that older people at risk of isolation and loneliness will be invited to participate in research and oral history projects where companionship and friendship will be a significant outcome. We will work in partnership with Hastings Museum and The Keep in Falmer, both have significant archives relating to HTH and will provide workshops and training for our volunteers.

Visitors to the town interested in heritage/architecture will be able to find out more about the history of the Church, its stories and its treasures. Tourism SE estimated that around 3.8 million tourism day trips were made to Hastings in 2019. Many of these tourists attracted by the heritage of Hastings and the 1066 story. The Church story will be better interpreted, and the restored Church will have much greater potential to attract visitors to this part of the town. We anticipate 3,000 tourism visitors will be newly attracted to the Church. By having regular 'Church Stories' open days (two per month) HTH will become a part of the heritage trail around Hastings.

There will be professional benefits for neighbouring churches. In discussion with the Diocese of Chichester, we have identified three major parish churches on the Heritage at Risk register

that have significant historic fabric issues and a desire to develop their heritage spaces for wider community use and engagement. We will share learning and provide mentoring for them to establish if they can and should work up an approach for funding to the NLHF, with insights in how to go about it. The Diocese will be involved in selecting the appropriate church heritage assets for mentoring support. We will host two half-day site visits to HTH for Diocesan staff which will include presentations from the incumbent, project leader, heritage adviser and architect. There will be five meetings off-site, for an HTH project lead and heritage engagement staff to talk to the PCCs.

Direct employment opportunities will be three project posts and associated construction apprenticeships.

In summary, Activities are expected to include:

- Recruit and train volunteers
- Restore and conserve present Missal
- Restore and Conserve War memorial
- Carry out research project with Hastings Museum and The Keep
- Devise interpretation strategy and plan
- Create interpretation for the Church and its Treasures both physical and digital
- Create additional digital content for all interpretation to be used on website and app
- Develop Heritage micro site on HTH website
- Carry out oral history project recording memories of HTH and the surrounding area
- Work on skills development and youth unemployed support with East Sussex College
- Implement apprenticeships, work experience and young volunteering programme
- Implement support programme for young carers based around heritage activities
- Create 'Church Stories' days opening HTH to visitors twice per month with a programme of guided tours, talks and events.

Budget

The budgets for Development and Delivery Phase of the project are as follows:

Description	Order of Cost	VAT	Total incl. VAT
Capital Costs			
Capital costs e.g. prelims, purchase of property, digital outputs, equipment, repair and conservation, new building work	2,140,309	428,062	2,568,371
Other Capital costs e.g. surveys, decant, loose FFE	190,500	35,100	225,600
Professional Fees	693,846	138,769	832,616
Total Capital Costs	3,024,655	601,931	3,626,586
Activity Costs			
New staff costs	288,000	0	288,000
Other Activity Costs e.g. training, volunteer expenses, events, delivering activity plan	290,000	52,000	342,000
Total Activity Costs	578,000	52,000	630,000
Other Costs			

Other costs e.g. governance review, recruitment, publicity, evaluation, community grants, increased management and maintenance	71,500	14,100	85,600
Contingency	674,156	129,251	803,407
Inflation	376,600	70,120	446,720
Volunteer time	44,760	0	44,760
Total Other Costs	1,167,016	213,471	1,380,487
Total	4,769,671	867,402	5,637,074

1.2.3 The Project Team

Holy Trinity Hastings will also be procuring or have procured the following Consultants to comprise the Project Team:

- Project Manager
- Quantity Surveyor
- Architectural Design Team (Including Principal Designer, Conservation Architect, Structural Engineer, MEP Engineer, Access Consultant, Lighting Designer)
- Activity
- Interpretation Planner
- Business Planner
- Evaluation Consultant
- Fundraising Consultant

1.2.4 Programme

In the Appendices there is a detailed programme. Below are the key dates:

RIBA 2	June - October 2024
Development Review with NLHF	October 2024
RIBA 3	October 2024 – March 2025
Submission of Round Two application to NLHF	May 2025
RIBA 4	October 2025 – April 2026
Procurement and appointment of Contractor	April – July 2026
Works on site	August 2026 – July 2027
Launch event	November 2027
End of Rectification Period	July 2028
Delivery of Activity Plan Completed and final submission to NLHF	February 2029

2.0 Tender Instructions

2.1 Tender Requirements

The following documents must be provided:

- A staged fee proposal including expenses
- Form of Tender (Appendix I)
- Responses to Quality Criteria
- Two references of Clients for whom you have completed similar work that we can contact
- Details of any assumptions made in preparing the above information
- Copies of Insurance Certificates for Professional Indemnity, Public Liability, and Employer's Liability
- Health and safety, environmental and equal opportunities policies
- Company accounts for the last three years
- Company history

2.2 Submission

Tenders must be submitted by no later than 21st May 2024 via email or We transfer or other file sharing system to Emma Kersey emma.kersey@hthchurch.org and the email subject title to state "Holy Trinity Hastings: QS".

During the tender period, should the tenderer wish to present questions or seek clarification on any information contained within this pack, requests will only be considered up to 9th May. Please submit any queries to Emma Kersey emma.kersey@hthchurch.org

2.2.1 Procurement Programme

The programme for the procurement process is as follows:

Deadline for questions and clarifications	9 th May
Deadline for responses	14 th May
Deadline for tender submissions	21 st May
Online interviews (if required)	29 th May
Award of appointment	5 th June
Appointment commences	17 th June

2.2.2 Selection Criteria

Qualitative		
Three examples of Projects which include <ul style="list-style-type: none"> - National Lottery Heritage Fund funding (or similar) - Interpretation (Exhibition, AV etc) - Conservation work to Grade I or II* or II listed building And set out the lessons that you have learnt which are relevant to Holy Trinity Hastings (Maximum 1 side of A4 per case study)	30%	
Methodology for the Project		20%
Set out how your organisation supports training of young people in relation to your discipline and what specifically you will do on this project		10%
CVs of the key personnel that will work on the Project		10%
Quantitative		
Price Overall		30%

2.2.3 A desktop assessment will be carried out of all tenders received against the criteria outlined below. Where questions are to be scored and weighted, each question and sub-question will be scored in accordance with the scoring matrix below. The score will then be awarded and the percentage weighting applied to give the weighted score for that question.

Capability	Response	Remark	Marks
Supplier is likely to be able to meet the needs of the Client.	Response exceeds the anticipated answer and is completely convincing and relevant to the Project with substantiation from independent sources and references.	Absolute Confidence	10
Supplier is likely to be able to meet the needs of the Client.	Response comprehensively answers the question and is convincing and relevant to the Project.	Confidence	8
Small risk that Supplier will not be able to meet the needs of the Client.	Response sufficiently answers the question without omission and is generally convincing and relevant to the Project.	Minor Concerns	6
Moderate risk that the Supplier will not be able to meet the needs of the Client.	Response has minor omissions and is in part(s) unconvincing or irrelevant to the Project.	Moderate Concerns	4
Significant risk that the Supplier will not be able to meet the needs of the Client.	Response has major omissions and is largely unconvincing or irrelevant to the Project.	Major Concerns	2

Supplier will not be able to meet the needs of the Client.	No response or misleading response provided.	Not Acceptable	0
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The price related elements of the qualitative criteria will be scored in accordance with the following:

The lowest price or percentage will be awarded maximum mark of 10. All other tenders will then be assessed against the lowest with marks being deducted by the percentage that their submission is higher as per the worked examples below. Note that the minimum score that will be awarded is 0.

Example 1	Tender Price	Percentage Difference from the Lowest (x%)	Calculation of Score 10 – (10*x%)	Score Awarded
Tenderer A	£10,000	0%	10 – (10*0%)	10
Tenderer B	£12,000	20%	10 – (10*20%)	8
Tenderer C	£17,000	70%	10 – (10*70%)	3
Tenderer D	£25,000	150%	10 – (10*150%)	0
Example 2	Tender Percentage	Percentage Difference from the Lowest (x%)	Calculation of Score 10 – (10*x)	Score Awarded
Tenderer A	20%	0%	10 – (10*0%)	10
Tenderer B	25%	25%	10 – (10*25%)	7.5
Tenderer C	30%	50%	10 – (10*50%)	5
Tenderer D	45%	125%	10 – (10*125%)	0

The resource related elements of the qualitative criteria will be scored in the same way but to the inverse with the highest resource awarded maximum mark of 10. All other tenders will then be assessed against the highest with marks being deducted by the percentage that their submission is lower as per the worked example below. Note that the minimum score that will be awarded is 0.

Example 3	Tender Resource Days	Percentage Difference from the Highest (x%)	Calculation of Score 10 – (10*x%)	Score Awarded
Tenderer A	200	0%	10 – (10*0%)	10
Tenderer B	180	10%	10 – (10*10%)	9
Tenderer C	140	30%	10 – (10*30%)	7
Tenderer D	30	85%	10 – (10*85%)	1.5

In addition to the desktop assessment, tenderers may be invited to attend a clarification meeting on 15th May 2024 on Teams/Zoom.

3.0 Scope of Service

3.1 Introduction

The Consultant shall provide the Services described with an excellence of service as expected of a competent, professional person of the relevant discipline. The Consultant is expected to have experience in carrying out such services in relation to works of similar size, scope and nature to the proposed works.

This appointment is for both Development and Delivery phases.

3.2 Basis of appointment

The employer will be Holy Trinity Hastings.

The contract will run from appointment to the end of the Project, predicted to be around July 2028 (including end of rectification period). There will be a break clause between the NLHF Round 1 and Round 2 applications. Reappointment will be subject to a successful Round 2 application. The Contract

The budget for this appointment is £23,000 excl. VAT in Development Phase and £53,600 excl. VAT in Delivery Phase based on a value of £2,140,309 for Construction Costs (excl. inflation and contingency) and £100,000 for Interpretation Costs (excl. inflation and contingency).

3.3 Professional Fees

- Please complete the Form of Tender and return it with your tender response/ offer. The Form of Tender is included at Appendix I.
- The fee proposal to provide the services indicated in the Schedule of Professional Services is to include all reasonable expenses and disbursements.
- The fee proposal is to be presented in a clear manner, supported by a stage-by-stage breakdown, presented in sufficient detail and a style that enables a clear understanding of the fee, services, programme and deliverables for each stage, with any specific exclusions stated.

3.4 Scope of Service Summary

The Quantity Surveyor (Consultant) shall include within their tender allowances for undertaking the following duties in connection with the appointment:

- a) In relation to the total Project budget:
 - Co-ordination of end stage cost reports
 - Assist with coordinating a total Project budget including construction, fees, direct costs, inflationary and contingency allowances and risk allowances
 - Cashflow of all Project costs and income

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- Monthly financial reports.
- b) In relation to funding:
- Preparation of all cost reports or information required for funding; applications, reporting, audits.
 - Cost Reports for end stage reporting.
- c) In relation to the construction cost:
- Preliminary budget estimates
 - Cost planning
 - Cost checks
 - Cashflows
 - Co-ordinating the preparation of tender documents
 - Contract advice and support
 - Post contract monitoring of variations including change control procedures
 - Interim valuations
 - Agreeing final accounts.
- d) Liaise with Holy Trinity Hastings and other Consultants to prepare cost information in line with National Lottery Heritage Fund Round 2 application and guidance and to cover all aspects of the Project e.g. capital, fit out, interpretation, activity, staffing, in kind contributions, volunteer hours and other costs.
- e) The Consultant shall exercise all reasonable skill, care and diligence in the performance of the Services, and must notify Holy Trinity Hastings, Project Manager, other Consultants and contractor as soon as the Consultant is aware of a matter that may adversely affect the Project or its performance.
- f) The Consultant shall attend meetings and visit the Site to properly progress the works to ensure the successful completion of the Project and mitigate any delays or additional costs. Meetings will include, but not be limited to the Client meeting, Project and Design team meetings and Site Progress meetings.
- g) The Consultant shall issue monthly Project Progress Reports detailing the Project status under the following headings:
- Works Undertaken
 - Forthcoming Actions
 - Information / Decisions / Key Actions Required
 - Cost report
 - Risk Issues
 - Issued Information / Design Status.
- h) The cost report is to be produced in a format to be agreed with the Project Manager detailing total Project costs.

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- i) The Consultant shall be required to liaise and work in close collaboration with the Project Manager, Holy Trinity Hastings, the Principal Designer and the other Consultants to maximize the Project's success.
 - j) The Consultant will liaise closely with the Project Team to ensure clear demarcation and understanding of respective costs.
 - k) Perform the Services necessary for completion of the works in line with the Project programme.
 - l) Monitor the design development against approved cost targets and the production of design information against the design programme to enable cost checks to be undertaken and if delayed advice, the Project Manager's actions can be taken accordingly.
 - m) Provide input and support to Holy Trinity Hastings and the other Consultants throughout the design development and implementation process.
 - n) Liaise closely with the other Consultants throughout and ensure effective demarcation of the construction works to avoid gaps or duplication.
 - o) Support the Project Team and construction contract administrators in the effective administration of the works contracts.
 - p) Input into development of the master programme and Project element programmes for the Project and support the team in regularly reviewing these.
 - q) Review drawings and specification produced by the other Consultants and report on cost and programme implications.
 - r) Provide cost advice on maintenance, life cycle costing and prepare cost in use studies accordingly. Input into the preparation of the Management and Maintenance Plan for the Project.
 - s) Assist with risk identification and reduction strategies as well as provide costing implications for risks.
 - t) Attend and contribute to value engineering, value management, sustainability and risk management workshops and exercises throughout the Project duration.
 - u) Print, reproduce or purchase all documents, drawings, and other records necessary for the proper performance of the Services.
 - v) Provide information to the Project Manager, the other Consultants and to the Contractors from time to time as necessary to enable them to carry out their respective duties.
 - w) Give to Holy Trinity Hastings reasonable prior notice of and invite them to attend all meetings called by the Consultant in relation to the Project; attend all meetings called by Holy Trinity

Hastings, the Project Manager and the other Consultants in relation to the Project as appropriate/ reasonable.

- x) Keep full and proper records of all key meetings and negotiations attended or conducted by the Consultant and make the same available for inspection by Holy Trinity Hastings forthwith on request.
- y) Deliver the Project in line with the Project Execution Plan (PEP) and report progress against the PEP baseline throughout.
- z) Assist Holy Trinity Hastings and the Project Manager in preparing information for funders and primary stakeholders, e.g., grant draw down documentation.
- aa) Provide a pro-active cost advice service to support Holy Trinity Hastings and the other Consultants in considering the cost implications of design options/ alternatives or constructional approaches throughout.
- bb) Perform such other duties as may reasonably be required by Holy Trinity Hastings to secure the completion of the Project.
- cc) Attend and contribute to meetings with funders as required e.g. National Lottery Heritage Fund.
- dd) Prepare all cost reports or information required for funding; applications, reporting, audits.
- ee) Provide cost reports in line with the NHLF budget headings.
- ff) The Consultant shall, if requested to do so, assist Holy Trinity Hastings in respect of any claims or proceedings made in relation to any of the other Consultants or the Contractors.

3.2 Detailed Scope

3.2.1 Developed Design (RIBA Stages 2 & 3)

a)	Assist the Project Manager to prepare a report for Holy Trinity Hastings on the procedures to be adopted in inviting tenders from Contractors for the Project and the contract conditions to be used.
b)	Provide cost information to the other Consultants for the purposes of establishing initially the outline design proposals and then the scheme design.
c)	Prepare the master cost plan for the Project based on the design prepared by the other Consultants in consultation with the Project Manager and in a form to be approved by Holy Trinity Hastings.
d)	Agree the master cost plan with the Client/Project Manager.
e)	Provide cost information to the other Consultants for the purposes of consultation and liaison with planning authorities, building control authorities, fire authorities, environmental authorities, licensing authorities and statutory undertakers.

f)	Provide cost information for consultation with those identified by Holy Trinity Hastings and for special presentational information to be used by the Client.
g)	Review Cost Information prepared for NLHF Round 1 bid and suggest budget allocations for delivery.
h)	Review with Holy Trinity Hastings and the other Consultants alternative design and construction approaches and cost implications.
i)	Carry out any of the general services which may be reasonably necessary or required from time to time.
j)	Prepare cost reports/plan at the end of each RIBA Stage. Meet with the Design Team to review and check the Cost Plan. Present the Cost Plan to Holy Trinity Hastings and Project Team.
k)	Input into the preparation of the Management and Maintenance Plan and provide a detailed budget estimate for the maintenance works detailed.
l)	Support Holy Trinity Hastings and Project Manager in the preparation of funding and grant draw down applications.
m)	In co-operation with the other members of the Project Team, undertake all work necessary to obtain Holy Trinity Hastings's approval to proceed on the basis of the agreed proposals. Advise on the cost effect of energy options. Advise on procurement options.
n)	Liaise with Holy Trinity Hastings and other Consultants to prepare cost information to support the Round 2 bid, in line with National Lottery Heritage Fund application form and guidance and to cover all aspects of the Project including capital works, fit out/ signage/ graphics, interpretation, activity, staffing, in kind contributions, volunteer hours and other costs.
o)	Advise on appropriate levels of inflation.
p)	Provide such cost advice as is necessary on alternative design solutions and exercise all reasonable skill, care and diligence to ensure that the final solutions adopted are within the overall cost for the Project approved by Holy Trinity Hastings.
q)	Where Holy Trinity Hastings has indicated the possibility of a change to the agreed brief during the design phase, inform Holy Trinity Hastings of the cost and programme implications and obtain instructions from Holy Trinity Hastings.
r)	Provide cost information for consultation with those identified by Holy Trinity Hastings and for special presentational information to be used by Holy Trinity Hastings.
s)	Exercise all reasonable skill, care and diligence to ensure that life cycle costings and environmental assessment techniques are applied to the Project and adopt solutions giving the best overall value for money and, where this may result in the cost limit for the Works being exceeded, make recommendations to Holy Trinity Hastings and obtain instructions.
t)	To the extent considered necessary, and following consultation with, and approval by Holy Trinity Hastings, in conjunction with the Lead Design Consultant, invite pre-tender quotations for major items.

Note: The following stages are subject to the successful outcome of the NLHF Second Round Bid Application.

3.2.2 Technical Design (RIBA Stage 4)

a)	Assist the other Consultants by the provision of cost advice in making and negotiating all necessary applications for and giving all notices required to be given for detailed town planning and listed building consents, building bye-law, building act, building and fire regulations approvals and all other statutory approvals and consents required for the Project.
b)	Prepare any special cost reports or financial appraisals for the use of Holy Trinity Hastings or reasonably required in connection with the approvals and consents referred to in the foregoing paragraph or for negotiations with adjoining owners, public authorities, licensing authorities, financing bodies, adjacent tenants and others.
c)	Assist the other Consultants as requested by Holy Trinity Hastings in making and negotiating with statutory undertakers all approvals, agreements, leases and consents necessary for the installation, removal and/or relocation of their services and for the provision of supplies.
d)	Keep Holy Trinity Hastings constantly informed of the cost involved in any such negotiations, applications, approvals, etc. referred to above.
e)	Provide cost advice and assist the other Consultants and the Project Manager as required by Holy Trinity Hastings in making and negotiating all other applications and approvals necessary for the Project such as those for licences and negotiations in connection with party wall.
f)	Advise on the pre-purchasing by Holy Trinity Hastings of items of plant, materials or goods which are on long delivery periods.
g)	Assist the Project Manager to prepare the master programme and agree the same with Holy Trinity Hastings.
h)	Support and assist the Project Manager in preparation of a Project Execution Plan (PEP) and the Project definition documents for the Project.
i)	Support Holy Trinity Hastings and Project Manager in the preparation of funding applications.
j)	Carry out any of the general services which may be reasonably necessary or required.
k)	In conjunction with the Project Manager lead on the discussions on the most suitable options for the procurement of the Works, make recommendations to Holy Trinity Hastings and obtain instructions.
l)	Liaise with the Professional Team and procure demolition, strip-out, site investigation and enabling works contracts required before the Building Contract.
m)	Incorporate any recommendations from surveys and investigations into Project costs.
n)	Obtain drawings or other necessary information from the other members of the Project Team and prepare schedules, bills of quantities or other documents necessary for the placing of contracts.

o)	Consider the most suitable options for procuring the Works and, following discussion with other Consultants who may be appointed, make recommendations to Holy Trinity Hastings and obtain instructions.
p)	In liaison with the other members of the Project Team, exercise all reasonable skill, care and diligence to ensure that all schedules, bills of quantities or other documents necessary for placing of contracts are completed and fully co-ordinated, are in accordance with the brief approved by Holy Trinity Hastings and are available on the programmed date. Advise Holy Trinity Hastings on the proposed provisional sums included in the tender documentation before tender issue.
q)	Prepare a final cost plan for the Project based on the approved cost and anticipated start and completion dates. Thereafter, monitor the development of the design against that cost plan up to tender stage. Report any anticipated difficulty to Holy Trinity Hastings, including proposals for overcoming that difficulty, and obtain Holy Trinity Hastings instruction in sufficient time to allow corrective action to be taken.
r)	Ensure that a pre-tender cost check is prepared based on the tender documentation and inform Holy Trinity Hastings of the result of that check.
s)	Agree with Holy Trinity Hastings final arrangements for the obtaining of tenders.
t)	In liaison with the other members of the Project Team, invite tenders from contractors included on the list approved by Holy Trinity Hastings and arrange for tenders to be returned in accordance with Holy Trinity Hastings tendering procedures.
u)	Copy all correspondence regarding the obtaining of tenders direct to Holy Trinity Hastings.
v)	As Holy Trinity Hastings may require, provide costs for the purposes of calculating the fees of other Consultant Disciplines.
w)	Carry out an arithmetical and technical check of the contractors' priced documents prior to producing a tender report to Holy Trinity Hastings.
x)	In liaison with the other members of the Project Team, report on the tenders received, make recommendations to Holy Trinity Hastings and advise on any corrective action which may be required if the lowest tender is higher than the approved cost for the Works and obtain Holy Trinity Hastings instructions.
y)	Advise Holy Trinity Hastings on the commercial and general risk implications associated with any clarifications, exclusions and qualifications in the bids received from the tendering parties and suggest mitigating measures as appropriate.
z)	Ensure that the risk register is updated and shared with Holy Trinity Hastings as part of the final tender evaluation and following the acceptance of a tender.
aa)	Ensure that the proposed acceptance of any exclusions, clarifications, and qualifications as part a tender negotiation is shared with the Project Team and obtain feedback on the any implications on their design, specification including interfaces with contractor designed elements.
bb)	Obtain Holy Trinity Hastings's decision regarding the acceptance of a tender.
cc)	Obtain Holy Trinity Hastings's approval to proceed to Stage 5.

3.2.3 Production Information and Bills of Quantities

a)	On the basis of the drawings and documents prepared by the other Consultants prepare preliminaries, bills of quantities, schedules of rates and other pricing documents for inclusion in the tender enquiry documents. Assemble invitations to tender for review by the Project Manager, the other Consultants and Holy Trinity Hastings. Prepare pre-tender estimates for works packages to check the adequacy of the budget and assist the team in re-aligning aspirations where necessary.
b)	Provide cost information to assist the other Consultants to submit plans for proposed building works for the approval of funders or others as requested by Holy Trinity Hastings.
c)	Carry out any of the general services which may be reasonably necessary or required.

3.2.4 Tender Action

a)	Discuss and agree with the Project Manager and the other Consultants, the split of the work packages, approach to phasing and the various tender lists. With the Project Manager, receive and take account of the comments of the other Consultants on the invitation to tender documents.
b)	With the Project Manager, interview tenderers (where appropriate in conjunction with the other Consultants) and negotiate prices with the tenderers as authorised by Holy Trinity Hastings.
c)	Analyse the tenders and programmes received in collaboration with the other Consultants and assist the Project Manager to report to Holy Trinity Hastings with recommendations for acceptance.
d)	Where required by Holy Trinity Hastings, ensure that the contracts entered into with the Contractors include all ancillary documents: bonds, guarantees and collateral warranties as referred to in the contract.
e)	Assist Holy Trinity Hastings, the other Consultants and the Contractors in the selection and appointment of specialist sub-contractors and suppliers prior to commencement of works on Site.

3.2.5 Construction (RIBA Stages 5)

a)	In liaison with the other members of the Project Team, provide Holy Trinity Hastings with the documents necessary to let the Works contract
b)	Prepare the Contract Documents and issue to Holy Trinity Hastings for review before issuing to the Contractor for execution.
c)	Report to Holy Trinity Hastings on the anticipated cash flow.
d)	Undertake risk assessments and provide inputs to the Project risk register. Cost the risk register and update when reasonably required by Holy Trinity Hastings, and for the monthly cost report.
e)	Undertake value management exercises.

f)	In collaboration with the other Project Team members, assist the Contract Administrator in administering the terms of the Works contract during operations on site and relating to the completion of the Works.
g)	Attend the regular meetings with the Contractor and other members of the Project Team. Provide advice on the cost position of the Project relative to the overall cost of the Works approved by Holy Trinity Hastings and recommend any corrective action which may be necessary.
h)	In liaison with the other members of the Project Team, exercise all reasonable skill, care and diligence to ensure that rigorous post contract cost control procedures are established to ensure financial control covering the issue of instructions which vary the Works, formal Change Requests, uninstructed potential changes arising from design development post contract, and early warning reporting of potential changes raised by either the Client, Project Team or Contractor. Issuing cost reports to the Project Manager on a monthly basis.
i)	Visit the site at such intervals as are necessary to be fully aware of all matters which could affect the cost of the Works and keep appropriate records.
j)	Produce monthly financial statements or at such other intervals to be agreed, showing the current financial position of the Project and a forecast of the cost at completion and submit directly to the Project Manager, and copy to Holy Trinity Hastings and the other Consultants on the Project Team.
k)	Value work in progress including the adjustment for variations in accordance with the Works contract and make recommendations to the Project Manager or direct to Holy Trinity Hastings as applicable.
l)	Throughout the course of the Works contract, liaise with the Contractor and, as necessary, with others to ensure that settlements of all accounts for the Works are achieved within the stipulated period.
m)	Alert Holy Trinity Hastings, the Project Manager and the other members of the Project Team to the possibility of receiving claims from the Contractor. If such claims are submitted, keep Holy Trinity Hastings and others fully informed at all stages.
n)	If instructed, and in co-operation with the other members of the Project Team concerned, evaluate claims and make recommendations.
o)	As requested by Holy Trinity Hastings, or by Project Manager or other members of the Project Team, provide estimates of cost of proposed variations to the Project and make suitable allowance in periodic cost reporting.
p)	At such intervals as may be necessary, update the forecast of cash flow and inform Holy Trinity Hastings accordingly.
q)	Assist the Project Manager to recommend to Holy Trinity Hastings adjustments to the master programme as may be necessary in the light of progress on Site
r)	Advise on the desirability of making payment for off-Site goods and materials. Assist the other Consultants in valuing the same.
s)	Advise on all insurance matters arising in relation to the Project and assist the Contractors in the submission of and settlement of any claims pursuant to such insurances.

3.2.6 Handover (RIBA Stage 6)

a)	Undertake tasks listed in Handover Strategy.
b)	Prepare a final account or accounts for the Contractor and any specialist sub-contractors in accordance with the terms of the contract.
c)	Provide a detailed statement of final cost to the Project Manager and Holy Trinity Hastings.
d)	Make recommendations for final payment.

3.2.7 Post Occupancy (RIBA Stage 7)

a)	Undertake tasks listed in Handover Strategy.
b)	Within 12 months of handover, participate in a workshop review of the Project to assess Project Performance, agree lessons learned, and also positive/negative aspects of the design and construction that will contribute to improvements on future Projects.

Appendices

Appendix I Form of Tender

Appendix II Programme

Appendix III Round One NLHF Application

Appendix IV Round One Order of Costs