

All Saints Church, Sandon

Evaluation Consultant

Invitation to Tender

1. Introduction

1.1. All Saints Church

All Saints Church, Sandon is a Grade 1 listed building with a heritage story that goes back as far as the 12th century. The Stories of the people who have shaped the architecture and art of this building have also shaped the local landscape and played a crucial role both locally and nationally. The church is a lasting monument to the tales of the past. It embodies a rich and colourful history from Saxon times, through to establishment after the Norman conquest, a survivor post reformation and a symbol to the families who have cared for it and the local area that has treasured it.

1.2. Project Overview

The church is in a very rural location and many people are unaware that the building is there. The building and its story need to be re-established locally and new ways of creating access explored. The project, which is funded by The National Lottery Heritage Fund, will focus on the development of new ways of engaging a wider group of people, centred around the preservation of the building, its history, and the display of All Saints' unique heritage. This will include the continuing establishment of a heritage website, restoration of windows, a royal coat of arms, tombs, wall paintings, and monuments.

1.3. Project Team

The Parochial Church Council of All Saints Church in Sandon, Staffordshire has already appointed key roles for the project during its Development Phase. The table below outlines the project team and their respective roles:

Role	Consultancy
Project Coordinator and Critical Client Friend	Greenwood Projects Ltd.
Architect	BHB Architects
Quantity Surveyor	Armsons Barlow
Digital Consultant	Orion Creative Services
Activity Co-ordinator	TBC
Evaluation Consultant	TBC

2. Scope of services

2.1. Requirement

The PCC wishes to appoint an Evaluation Consultant to review the Delivery Phase of the church's

National Lottery Heritage Fund project. The evaluation will need to follow The National Lottery Heritage Fund guidance and any other funder requirements. It is also vital that key learning points are identified throughout the process. The Heritage Committee are looking for an individual(s) who is dynamic, self-motivated, organised, good with people, and able to establish a good working relationship with the Heritage Committee.

The programme will run from Spring 2025 – Spring 2027. It should be noted that activities will finish in December 2026, but the period to support with evaluation of the project will be required until 2027.

2.2. Specific Duties

The Evaluation Consultant will be required to:

- Review the previous evaluation documents and data collected during the Development Phase, including the Evaluation Framework. The Consultant will be expected to make any appropriate changes for the Delivery Phase.
- Review the Activity Plan and capital works programme submitted as part of the Round 2 application to The National Lottery Heritage Fund.
- Agree to an evaluation programme, with clear responsibilities for data collection for the delivery phase.
- Work with the project team and consultants and provide a toolkit for data collection to the project to ensure effective collection for all areas.
- Collate and monitor data and ensure that it meets the needs of the project.
- Detail how the Approved Purposes and Investment Principles are met and their impact on the project.
- Establish key challenges, lessons learned and successes, and how these can be applied as part of the project legacy and long-term sustainability.
- Ensure other project team members, staff, volunteers, partners and stakeholders feed into the evaluation process.
- Lead and deliver key data collection, interviews, focus groups, etc., as required and agreed to meet the project needs.
- Attend monthly project team meetings. Meetings will take place in person at the Parish Rooms in Sandon or remotely via Microsoft Teams.
- Have regular client meetings (anticipated once a month minimum).
- Produce reports which detail the impact of both the Activity Plan, Interpretation and visitor experience, the capital project, and the digital elements of the project. A schedule of reports should be agreed with the Client upon appointment. At a minimum, the Evaluation Consultant should produce a report after completion of the capital works, an interim report,

and a final report upon project completion and the grant expiry.

Post Project Delivery / Legacy

- Ensure ongoing robust approach to evaluation is in place to ensure that All Saints Church, Sandon can continue to evaluate progress against key markers.

3. Rules and Regulations

3.1. Submission

Tenders should be submitted to Greenwood Projects who are acting as Project Coordinators on behalf of The Client. Tenders must be submitted electronically to:

eleonor.hall@greenwoodprojects.com by 12 noon on Monday 24th February 2025.

Please use the following reference in the Email Subject line:

All Saints Church, Sandon Evaluation Consultant

3.2. Budget

The maximum total budget available for the evaluation of the delivery phase is £12,804 (inclusive of all expenses and VAT).

Please refer to the project programme in Appendix 1 to assist with providing your fee.

3.3. Timetable

	Action	Target Date
1	Invitation to Tender Issued	Tuesday 21 st January 2025
2	Invitation to Tender Return Date	12 noon on Monday 24 th February 2025
3	Invitation to Tender Review and Shortlisting	Tuesday 25 th February – Friday 7 th March 2025
4	Interviews	Wednesday 12 th and Friday 14 th March 2025
5	Award	w/c 7 th April 2025

3.4. Tender Process

- The deadline for tender submission is 12 noon on Monday 24th February 2025.
- Tenders will be evaluated in accordance with the criteria set out in Clause 4 of this Invitation to Tender.
- Notification of award of contract to the successful tenderer will take place as soon as possible according to the timetable.

3.5. Acceptance

The PCC is not bound to accept any tender.

3.6. Compliant Tenders

The PCC Sandon requires all tenderers to submit a compliant tender which must satisfy all the requirements of this Invitation to Tender. If no compliant tender is submitted, the PCC reserves the right to reject the tenderer's proposals from further consideration.

3.7. Validity

All tenders shall constitute offers and shall remain valid for a period of 2 months from their submission date. Submission of a tender assumes acceptance of this requirement.

3.8. Confidentiality

This Invitation to Tender and associated information made available by the PCC is done so on condition that it is treated as confidential by the tenderer and its advisors and is not copied or reproduced nor used other than as envisaged in the Invitation to Tender in order to permit a tender to be formulated. The information which the tenderer considers to be confidential information should be clearly marked as such in the tender or where it is provided in advance of the tender at the time of provision.

The obligations of confidentiality in this paragraph 3.8 shall not extend to any matter which the tenderer can show:

- (a) is in, or has become part of, the public domain other than as a result of a breach of the obligations of confidentiality under this Invitation; or
- (b) was independently disclosed to it by a third party entitled to disclose the same; or
- (c) is required to be disclosed under any applicable law, or by order of a court or government body or authority of competent jurisdiction.

All associated project documentation will be confidential. The PCC will decide on its release and distribution. The Consultant may not distribute it without prior consent from the PCC.

3.9. Copyright

The Consultant will assign the copyright of all outputs to the PCC for use in connection with its operations. The Consultant must clear the copyright for any images, illustrations or other material used.

3.10. Information

The information set out in this Invitation to Tender has been prepared in good faith but does not release the tenderer from its obligation to carry out due diligence and to verify the accuracy of the information.

The PCC does not accept any liability, nor does it make any warranty or representation express or implied as to the accuracy or completeness of the information provided in this Invitation to Tender

or in relation to any other information furnished to a tenderer as it's requested.

3.11. Costs

Tenderers will be responsible for all of their own costs in relation to negotiating and submitting a tender.

3.12. Publicity

Tenderers may not produce or procure any publicity in relation to this Project other than with the prior written agreement of the PCC as to the fact of publicity, its content and its timing.

3.13. Canvassing

Canvassing by a tenderer means the offering of any inducement or reward to any member or officer of the PCC or to any person acting as an advisor to the PCC or anything that would be a breach of Prevention of Corruption Acts. Canvassing shall lead to disqualification of the tenderer without prejudice to any civil or criminal liability which may be incurred.

3.14. Collusion

Any tenderer who fixes or adjusts the amount of his tender in accordance with any agreement or arrangement (other than with a member of its own expressly dis-closed consortium) or enters into any agreement or arrangement to refrain from tendering or to tender at above or below a particular amount shall be disqualified without prejudice to any civil or criminal liability which may be incurred.

4. Award Criteria

For the avoidance of doubt the PCC retains the right not to award any contract in relation to this Invitation to Tender.

Should the PCC wish to award a contract it will be awarded on the basis of whom offered the best value taking due account of relevant experience, previous performance on similar projects, commitment to the project and the service being value for money against the overall project budget. The PCC will assess the tenders against the following (*please prepare your responses in this chronological order*):-

- Knowledge and Experience – 30%
- Approach – 40%
- Price – 30%

We are seeking to appoint an Evaluation Consultant who can demonstrate knowledge and experience of similar projects with proven success.

4.1. Submission Requirements

Tenderers should include:

- Describe recent (within the last 3 years) examples of your experience, with at least one relevant National Lottery Heritage Fund projects.
- Describe your understanding of the scope of the project and the Client.
- Detailed methodology outlining how you will approach the project and work with the Client and project team. This must include a programme identifying key milestones.
- Provide evidence of Insurances required – Public Liability and Professional Indemnity.
- Identification of opportunities, risks or constraints and associated mitigations.
- Proposed fee structure with a breakdown of day rates. Travel time for site visits should be clearly set out and are included in the total fee.
- State availability for interview Wednesday 12th and Friday 14th March 2025.
- CVs (max 4 sides each) for key team members, including membership of relevant professional bodies and adherence to professional standards.
- Contact details for at least two references.
- Maximum tender page length 10 pages (exc. CVs).

4.2. Evaluation Criteria

The following evaluation method will be used to score the quality elements of the tender submission:

Evaluation Criteria	Rating (0-5)	x	Weight	=	Total
Knowledge and Experience					
a. Experience and Qualifications		x	3	=	
b. Experience of similar projects. Please include at least three examples, including at least one relevant National Lottery Heritage Fund project.		x	3	=	
Approach					
a. The tenderer understands the scope of the project and the needs of the client.		x	3	=	
b. Detailed methodology outlining how you will approach the project and work with the client and project team. To include programme identifying key milestones.		x	3	=	
c. Identification of opportunities, risks or constraints and associated		x	2	=	

mitigations.					
Grand Total					

4.5. Price Evaluation

Price will count for 30 marks and will be evaluated on the basis of each Tenderer’s tendered prices. This will be calculated as the sum of each of the aspects of price that are set out in that table.

The lowest overall tendered price will score full marks for price. The marks for price for each other Tender will be calculated by the following formula:

$$\frac{\text{Maximum marks for Price} \times \text{Price of lowest priced Tender}}{\text{Price of Tender being evaluated}}$$

3.6. Scoring of Quality

Assessment	Detail	Score
Very Poor	Either no answer is provided, or the answer completely fails to demonstrate that any of the Client’s requirements in the area being evaluated will be delivered in accordance with the Contract Documents.	0
Poor	Provides only limited assurance that the Client’s requirements in the area being evaluated will be delivered in accordance with the Contract Documents, so as to result in a poor standard of delivery of the works / services / supplies.	1
Reasonable	Demonstrates how a significant number of the Client’s requirements in the area being evaluated will be delivered in accordance with the Contract Documents so as to provide a reasonable standard of delivery of the works / services / supplies.	2
Good	Demonstrates how most of the Client’s requirements in the area being evaluated will be delivered in accordance with the Contract Documents so as to provide a good standard of the works / services / supplies.	3
Very Good	Demonstrates how almost all of the Client’s requirements in the area being evaluated will be delivered in accordance	4

	with the Contract Documents so as to deliver the works / services / supplies very well.	
Excellent	Demonstrates clearly and convincingly how all the Client's requirements in the area being evaluated will be delivered in accordance with the Contract Documents so as to deliver the works / services / supplies in an excellent way.	5

Where an assessment indicates that a score falls between two categories, half marks may be awarded.

Each aspect of the Tender evaluation will generally be undertaken by a panel. Where this is done, the individual scores of the panel members will be averaged to arrive at a combined score for each aspect of the Tender being evaluated. This score will be multiplied by the weighting for that item to give a total score for that aspect of the Tender.

The same panel will score all Tenders for the aspect of the evaluation in which they are involved. The panel reserves the right to interview. It is important to note the interviews will be held for clarification purposes only and will not be scored.

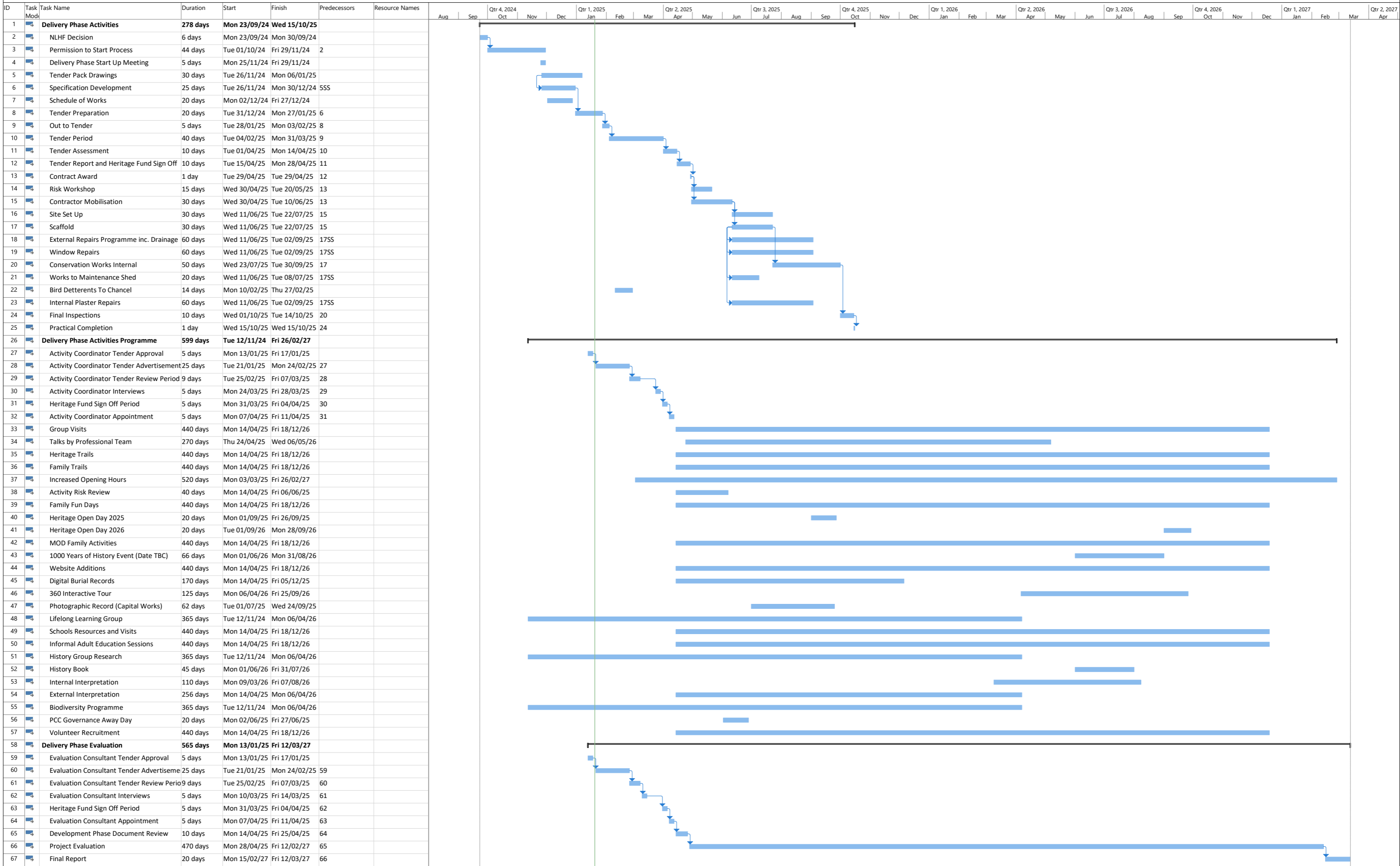
4.7. Insurances

Tenderers should provide a copy of their Public Liability Insurance and Professional Indemnity Insurance as part of the tender response.

4.8. References

Please provide two references.

Appendix 1: Programme



Project: 25 01 06 All Saints Sandon Date: Mon 20/01/25

Task Split

Milestone (Blue bar)

Project Summary (Grey bar)

Inactive Milestone (Light blue bar)

Inactive Task (Light grey bar)

Inactive Summary (Light blue bar)

Manual Task (Green bar)

Manual Summary Rollup (Light green bar)

Manual Summary (Light green bar)

Duration-only (Light grey bar)

Start-only (Green bar)

Finish-only (Green bar)

External Tasks (Blue bar)

External Milestone (Blue bar)

Deadline (Grey bar)

Progress (Grey bar)

Manual Progress (Blue bar)