



Save the White Lion Pailton

Invitation to Tender: Evaluation Consultant

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1. Save the White Lion: Overview

1.1 Background

The White Lion is a much-loved 18th century coaching inn, at the heart of the village of Pailton, North Warwickshire. It is Listed Grade II and has been at the heart of its community for over 300 years.

Over this time, the pub continuously changed and adapted to meet local needs, but it has retained both its architectural and social significance. There are clearly legible parts of the original timber framed structure still in place, along with evidence of former stables and domestic outbuildings. The context of the site is very much a key focal point along the village's main street (Coventry Road). The pub is well set back from the road, with land to both the sides and rear. This established setting creates a strong visual and heritage focus for the village and its community. The pub has, however, been closed for nine years, and is in poor repair. Its condition is fragile and deteriorating – without a plan for restoration now, this building, so important to the identity and history of the village, will be lost.

The aim of the community led project to Save the White Lion is to restore and renew the building and grounds and establish a sustainable community business at the heart of our village.

1.2 Scope of the Save the White Lion Project

The local community mandated Pailton Parish Council (PPC) to purchase the White Lion, setting up the Pailton White Lion Working Group (PWLWG) to lead on the renovation. Since then the PWLWG has carried out extensive community consultation to establish local residents' priorities for what the White Lion needs to provide for the village and the local area. These community consultations have provided us with a very clear set of aspirations for the future of the White Lion.

In summary, the plan is that the White Lion will provide: a community shop and post office; a pub and café/restaurant, extending into the grounds to the side and rear; workspace for artisan producers and makers in the one-time stable block; overnight/holiday accommodation on the upper floors; outdoor space for eating out, farmers' and makers' markets and a wide range of community activities.

The plans for the capital development project that we have developed include:

- Full conservation and restoration of the Listed Buildings, incorporating sustainable technologies for carbon neutral operation.
- Demolition of the modern block detracting from heritage significance.



- Reuse of the ground floor to provide, licensed areas for food and drink and kitchen and possible delicatessen
- Creating six en-suite rooms on the first floor and a large suite on the second floor for overnight/holiday accommodation.
- Restoring the historic stable block to provide working space and jobs for artisan producers shop and Post Office and/or local businesses.
- Landscaping external areas, providing disabled access, attractive gardens and garden loggia.
- Creating spaces and facilities for community activity, particularly for families and older generations facing isolation.
- Telling the stories of the village and its pub through interpretation and digital outputs.

The duration of the project and structure of the project plan are influenced by the Heritage Fund award process which divides the project into two stages. Firstly, a Development Phase which encompasses RIBA Stages 1 to 3 and secondly a Delivery Phase which encompasses RIBA Stages 4 to 7.

The project will provide a unique local opportunity for people to develop skills and learn about heritage. We are expecting our Project Team to fully engage with this process by contributing to hard hat tours on-site by the public, key stakeholders and heritage professionals, and give public talks within the community. The Project Team is not expected to organise these events, but they may be expected to attend and some events may happen outside the normal working week.

Overall costs for conservation, restoration and rebuild are estimated to be in the region of £850,000 (exc. VAT, contingency and inflation).



2. Evaluation Consultant Brief

2.1 Overview

Pailton Parish Council is seeking to appoint an appropriately qualified individual or organisation to evaluate the Save the White Lion project.

The Evaluation Consultant will report to the PWLWG, and they will work with other members of the design team to obtain all information necessary to complete the project within the approved project budget and programme.

The Evaluation Consultant contract is offered in two parts: the Development Phase contract will run from May 2023 until the NLHF Stage 2 Heritage Enterprise application in October 2023; then a break clause; followed by the Delivery Phase contract, beginning in March 2024. The continuation of the contract beyond the break clause is dependent on a NLHF Delivery Phase award and satisfactory performance by the Evaluation Consultant during the Development Phase.

The budget for this work is £2,000 (Development Phase) and £10,000 (Delivery Phase).

2.2 Skills and Experience required in the Evaluation Consultant

The PWLWG are particularly keen to receive applications from Evaluation Consultants who have worked on **Heritage Enterprise** projects, and understand their specific evaluation and reporting requirement.

2.3 Scope of Work

The Evaluation Consultant will be required to complete the following tasks, outlined for each phase of the project:

Development Phase

- Collect baseline data, which PWLWG can use for this and ongoing activities in order to demonstrate change in their impact;
- Review baseline data, identify any gaps and put measures in place to capture data during the Delivery Phase;
- Contribute to the Activity Statement, advising on best practice evaluation methods for the activities suggested;
- Attend PWLWG meetings as required;
- Support the Project Manager with Progress Reports to the Heritage Fund during the Development Phase by providing information on evaluation;
- Author an Evaluation report of the Development Phase of the project and its completion in accordance with the latest Heritage Fund guidelines.



Delivery Phase

- Develop an Evaluation framework focusing on outputs, outcomes and benefits for the Delivery Phase, building on what was prepared in the Development Phase as part of the Activity Statement;
- Oversee implementation of the Evaluation Framework during the Delivery Phase including measurement of outputs, outcomes and benefits, the execution of the capital works, and sustainability, community cohesion and economic impact;
- Develop processes and methodology (both quantitative as well as qualitative) for capturing ongoing evidence and measuring success, achievements against outcomes, and lessons learned;
- Support the Project Manager with Progress Reports to the Heritage Fund during the Delivery Phase by providing information on evaluation;
- Identify and interview key stakeholders to provide different perspectives (e.g. Trustees, Project Team, Education Providers, Volunteers etc.)
- Attend PWLWG meetings as required;
- Attend certain events and activities to undertake evaluation with site users (including schools, family groups, etc.) as required;
- Identify and provide support and some training for volunteers, staff, trustees in evaluation methods as required and make sure the focus on desired outcomes and ambitions is maintained;
- Collate data and analyse evidence throughout the project to draw out successes and shortcomings and suggest improvements as needed;
- Author the final summative Evaluation report of the Delivery Phase of the project and its completion in accordance with the latest Heritage Fund guidelines; working in close collaboration with the Management committee.

2.4 Timetable

The Development Phase work should be carried out between May 2023 and October 2023, with a draft plan available for review by June 2023 (or other date for mid-stage review agreed with NLHF), and a final plan submitted by October 2023.

Subject to a successful NLHF Delivery Phase award in March 2024, the Evaluation Consultant will complete the Evaluation Report for the Delivery Phase. Further information about the timetable of the project is given in appendix A2.

2.5 Fee

The fee available is £2,000 for the Development Phase and £10,000 for the Delivery Phase, including expenses and travel but excluding VAT.



3. Instructions for Application

3.1 Format of Applications

In addition to the **Form of Tender** (appendix A1) your application should include:

- Statement or Cover Letter outlining your approach to the evaluation work for the Save the White Lion project
- At least one example of previous evaluation work
- Fixed fee showing your daily rate, number of days spent on each task and including all fees and expenses
- CVs of all personnel who will deliver the services
- Two client referees
- Details of Professional Indemnity and Public Liability Insurance

Completed tenders should be returned by email by **midday on Monday 22nd May**.

If you would like to visit the White Lion in advance of submitting an application, or if you have any questions, please contact Sarah Hollingdale: sarah.hollingdale@greenwoodprojects.com

3.2 Assessment Criteria

Tenders will be assessed on the basis of 60% Quality and 40% Cost.

Quality Scoring (60%)

Quality will be assessed on the following criteria:

- Experience evaluating other similar projects; e.g. NLHF funded, pubs, community run enterprises
- Experience working on Heritage Enterprise funded projects
- Skills and Experience of the Key Personnel (as demonstrated in CVs)
- Approach to evaluation (as outlined in Statement or Cover Letter)

Cost Scoring (40%)

The tenderer who submits the lowest overall price will receive the full score of 40% available for the financial evaluation. Remaining bids will be awarded a score proportionate to the lowest priced bid according to the following formula:



Score = (lowest bid received/ bid price) x 40%

Abnormally low or high bids distort evaluation of tenders and where the PCC feels that a bid falls into one of these categories the tender will be asked to explain or clarify their bid. This includes the discounting of daily rates.

3.3 Tender Returns

Insurance

Tendering bodies will hold Professional Indemnity cover set at £2M and Public Liability at £5M.

Preparation of Tender

Tenderers are responsible for obtaining all information necessary for the preparation of their response; and all costs, expenses and liabilities incurred in connection with the preparation and submission of the Tender and attending any interviews will be borne by the Tenderer.

The Tenderer is expected to have carried out all research, investigations and enquiries which can reasonably be carried out and to have satisfied itself as to the nature, extent, and character of the requirements of the Contract (in the context of and as it is described in the Specification), the extent of the materials and equipment which may be required and any other matter which may affect its Form of Tender.

Non-consideration of Form of Tender

The PPC reserve the right not to award the contract to the highest scoring, lowest priced or to any tenderer; and reserve also the right to accept any of the same in whole or in part. The PPC may also refrain from considering any Form of Tender if it is not in accordance with the Form and Conditions of Tender, or the Tenderer does not provide all the information required or attempts to make variation or alterations to the Form of Tender, Conditions of Contract or the Specification.

Tenderer's Warranties

In submitting a Tender, the Tenderer warrants that:

- it has not done any of the acts in the Non-Consideration of Form or Tender,
- all information provided is true, complete and accurate in all respects including details of previous projects being presented as examples,
- it has full power and authority to enter into the Contract,
- it is of sound financial standing, and



- its partners, directors and employees are not aware of any circumstances that may adversely affect such financial standing in the future.

Confidentiality

The Form of Tender, the Conditions of Contract, the Specification, and all other documentation or information issued by the PPC relating to the Tender shall be treated by the Tenderer as private and confidential for use only in connection with the Tender and any resulting contract and shall not be disclosed in whole or in part to any third party without the prior written consent of the PPC. The documents which constitute the project and all copies thereof are and shall remain the property of the PPC (whether or not the PPC shall have charged a fee for the supply of such documents) and must not be copied or reproduced in whole or in part and must be returned to the PPC upon their request. All information provided by tenderers as part of a tender return will be treated as confidential.

Freedom of Information

Information in relation to this tender may be made available on demand in accordance with the requirements of the Freedom of Information Act 2000. Tenderers should state if any information supplied by them is confidential or commercially sensitive or should not be disclosed in response to a request for information under the Act, and should state why they consider the information to be confidential or commercially sensitive. This will not guarantee that the information will not be disclosed, but will be examined in the list of the exemptions provided in the Act.

Please note:

It is the Tenderer's responsibility to ensure all fees, rates and prices quoted are correct. Tenderers will be required to hold these or withdraw their tender in the event of errors being identified after the submission of tenders.

If a Tenderer fails to provide fully for the requirements of the specification in the tender it must either absorb the costs of meeting the full requirements of the specification within its tendered price, or withdraw the tender.

No tender will be considered which is late, for whatever reason nor will changes be permitted after the closing date.

All tenderers shall keep their respective Forms of Tender valid and open for acceptance by the PPC for 90 days from receipt.



3.4 Contact Details

Greenwood Projects have been appointed as Project Managers for the Save the White Lion Project, so any questions about the project, the Evaluation Consultant role, or the application process should be directed to:

Sarah Hollingdale: sarah.hollingdale@greenwoodprojects.com



A1. Form of Tender

Project: Save The White Lion

Professional Service: Evaluation Consultant

Name of Tenderer:

I/We, the undersigned, do hereby offer to execute and complete the above mentioned professional services in strict accordance with the Schedule of Services for the following lump sum fee:

£ _____ plus VAT for the development phase

£ _____ plus VAT for the delivery phase

Confirm figure in words: _____ plus VAT

Resources

Please state the number of days and day rates intended for the delivery and development phases in the table below:

Team	Day Rate £	No. of days
Director/ Partner		
Senior Consultant		
Consultant		
Other – specify		

The above day rates will be utilised to negotiate any additional works that may be required if deemed to be beyond the reasonable scope of the works specified. All day rates are to be based on a 7.5 hour day and are to include allowance for disbursement

Expenses and Disbursements

The fee offer is to include all expenses and disbursements (including printing charges).



Offer Period

This tender/ offer is to remain open for a period of 90 days from the date fixed to the return of tenders.

Dated this _____ day of _____ 20__

	Tenderer to provide responses; some are pass/ fail
Name of firm or company	
Postal address	
Registered address (if applicable)	
Company number (if applicable)	
Please indicate if you are: a sole trader, partnership, Public or Private Limited Company or other type of organisation	
Main contact	
Contact telephone number	
Contact email address	
Please indicate your level of Employer's Liability Insurance, the policy number and expiry date ¹	
Please indicate your level of Public Indemnity Insurance, the policy number and expiry date	
Please indicate your level of Professional Indemnity Insurance, the policy number and expiry date	
Signature of authorised person	
Name of authorised person	
Capacity in which signed	

¹ If you do not have any of these insurances please indicate if you will purchase them if awarded the contract. If they are not applicable e.g. you are not an employer please indicate this.

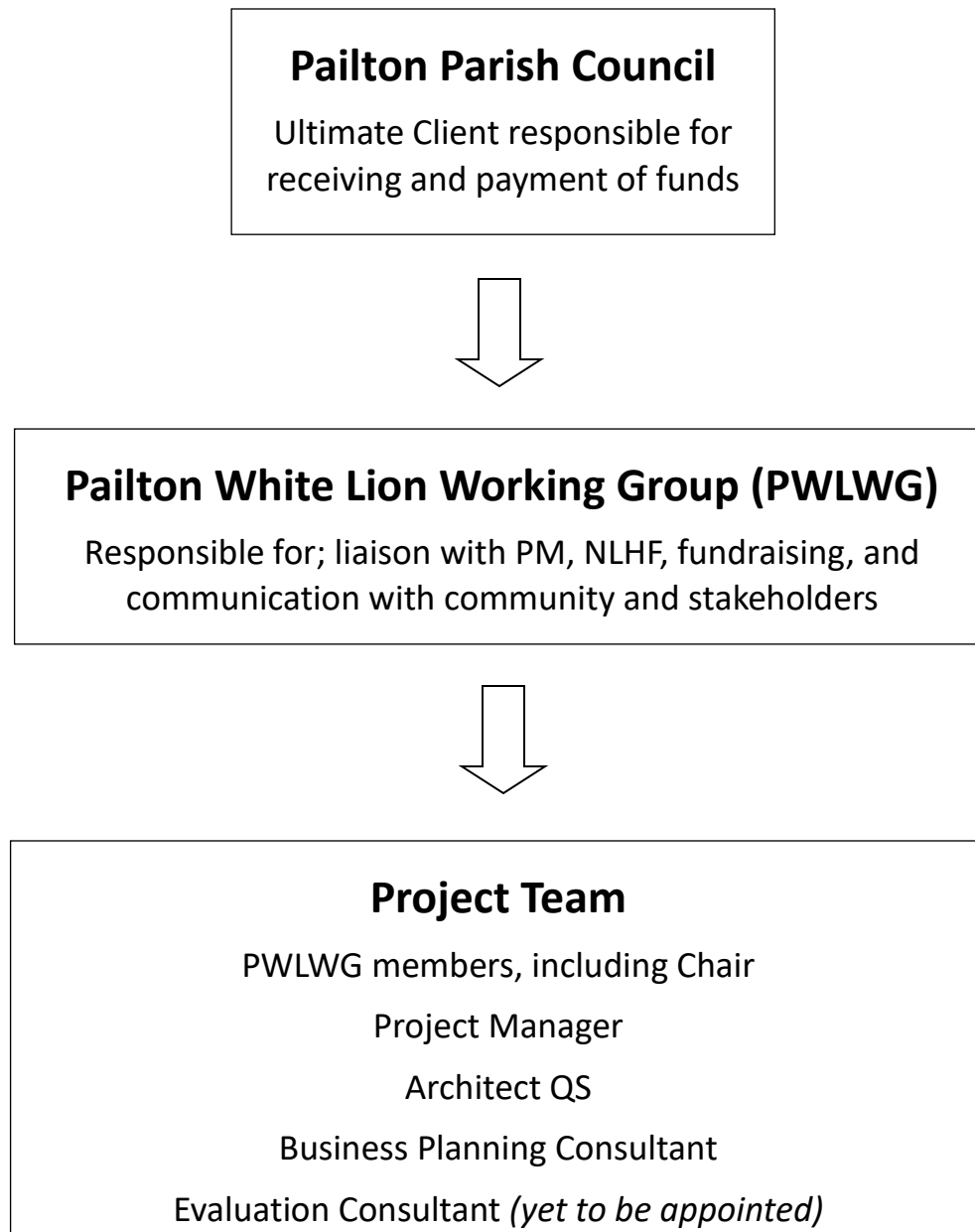


A2. Timetable for the Save the White Lion Project

Task	Start	End
Development Phase milestones		
Appoint project manager (PM)	Aug-22	Sep-22
Tender Project Team (PT)	Dec-22	Jan-22
Consultant Appointment & Start up	Jan-22	Mar-22
RIBA stage 2 works and sign off	Feb-22	Jun-23
RIBA 3	Jul-23	Sep-23
NLHF Round 2 application	Oct-23	Oct-23
Round 2 approval	Mar-24	Mar-24
Delivery Phase milestones		
Round 2 Permission to Start	Apr-24	Apr-24
RIBA 4 and main contractor procurement	Jun-24	Oct-24
Capital works	Nov-24	Jan-26
Internal fit out	Nov-24	Jan-26
Handover and opening	Feb-26	Feb-26
Contract defects period	Jan-26	Jan-27



A3. Organisational Structure





A4. Summary of the Draft Activity Statement

Summary of the draft Activity Statement, outlining the activities which will require evaluation.

Activity	Proposed method(s) of evaluation
<p>History of White Lion display Create display of artefacts and photographs</p>	<p>Final display Volunteer participation data (number and demographic spread)</p>
<p>Launch celebration Celebration event held at completion of the capital works</p>	<p>Attendee data (number and demographic spread) Attendee feedback Potential bookings of facilities</p>
<p>Memory Sharing Hubs: Meetings Events where locals share their memories of the White Lion and village</p>	<p>Attendee data (number and demographic spread) Attendee feedback</p>
<p>Memory Sharing Hubs: Output Using memories from the Hubs, create resources or activities that capture stories</p>	<p>Attendee data (number and demographic spread) Attendee feedback Resources produced</p>
<p>Interactive Post Office Events Celebrate the history of the Post Office in Pailton, through interactive events for adults and families</p>	<p>Attendee data (number and demographic spread) Attendee feedback</p>
<p>Oddfellow Society Lecture Lecture sharing the history of the Oddfellow Society</p>	<p>Attendee data (number and demographic spread) Attendee feedback</p>
<p>History of Travel Workshops History workshops for children to learn about the history of turn pike roads</p>	<p>Participation numbers Feedback from participants</p>
<p>1756 Talks Host talks and events related to the '1756 Acres' local history book</p>	<p>Attendee data (number and demographic spread) Attendee feedback</p>



Activity	Proposed method(s) of evaluation
<p>Family fun activities Host a range of family activities, relevant to village life in Pailton</p>	<p>Attendee data Attendee feedback</p>
<p>Community markets Host farmers markets and craft markets, to benefit local producers and local residents, and bring more people into Pailton.</p>	<p>Attendee data (number and demographic spread) Feedback from vendors Booking data; particularly how many vendors re-book to attend markets</p>
<p>Co-working space Create a co-working space for local professionals and students</p>	<p>Feedback from participants Booking data</p>
<p>Host community groups Host meetings and lunches for community groups</p>	<p>Feedback from participants Booking data</p>
<p>Traditional pub game tournaments Coordinate competitions for traditional pub games</p>	<p>Visitor numbers Competition records</p>
<p>Heritage Open Days Participate in Heritage Open Days</p>	<p>Attendee data (number and demographic spread) Attendee feedback</p>
<p>National Lottery Open Week Host special tours and events for lottery players</p>	<p>Attendee data (number and demographic spread) Attendee feedback</p>
<p>Community raised garden beds Create raised beds in the garden for community use</p>	<p>Completed beds Participation data Participation feedback Feedback from visitors to garden</p>
<p>Work Experience Placements Offer work experience opportunities and placements for local students</p>	<p>Participation data Participation feedback, including impact several months on</p>



Activity	Proposed method(s) of evaluation
<p>Volunteer training</p> <p>Offer training to volunteers in roles in the shop, pub, garden, etc.</p>	<p>Participation data</p> <p>Participation feedback, including impact several months on</p>
<p>Staff training</p> <p>Offer training to staff in roles including catering, retail, gardening, hospitality, enterprise units, etc.</p>	<p>Participation data, including staff retention data</p> <p>Participation feedback, including impact several months on</p>
<p>Accessibility training</p> <p>Training delivered by accessibility experts, to ensure that staff are equipped to provide an equal and inclusive experience for all customers and visitors</p>	<p>Participation data</p> <p>Participation feedback</p> <p>Visitor feedback</p>