



Save the White Lion – Project Management Brief



Project management services

Introduction to the project

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 seven 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.

The local community mandated the Parish Council to purchase the White Lion and since then the Working Group 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 pub, restaurant, deli/café; overnight/holiday accommodation on the upper floors; in the one-time stable block a community shop, post office and workspace for artisan producers and makers; creating front and rear gardens and outdoor space for farmers' and makers' markets and a wide range of community activities.

The capital development project that we have developed includes:

- 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.
- Extending to side to link outbuildings and create new toilet facilities.
- 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 community shop/Post Office and working space and jobs for artisan producers 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.

Audiences

Key audiences for this project are:

- Local Residents and surrounding villages
- Especially those without independent means of transport
- Passing trade from traffic coming to and from Magna Park
- Workers from home looking for a suitable environment to conduct business meetings and wanting to work amongst other people conducting similar activities
- International and national audience seeking accommodation in unique attractive historically significant, heritage surroundings.

Management of the project

The project team for delivering the capital works and Activity Plan is shown in the attached organisational chart.

Pailton Parish Council (PPC) are now seeking a **Project Manager** to take the scheme from RIBA Stage 2 through to delivery. The development phase (RIBA 2/3) is being funded by a National Lottery Heritage Fund grant and PPC funds that include a loan from the Public Works Loan Board, granted specifically to facilitate the 'Save the White Lion' project. The delivery phase will be funded by a second NLHF grant and a large fundraising campaign. This appointment is for the whole project, with a break clause after the development phase (RIBA 3) as delivery is dependent on securing a second grant and reaching the fundraising goal.

Other Appointments will be procured separately: -

- Architect led multi-disciplinary team (incorporating conservation architectural services, Conservation Management Plan, Principal Designer, Mechanical, Electrical and Plumbing engineers, Lighting consultant, Access consultant and Management and maintenance plan)
- Quantity surveying (Cost Consultant) services
- Structural Engineer
- Interpretation & Activity Planner (only development phase)
- Evaluation Consultant

Scope of works

The PPC anticipates the following scope of works for the Project Manager. This scope should be the basis of pricing for the return of tenders at this stage of the procurement process. However, the client reserves the right to finalise the scope on the outcome of funding applications and subsequently to reduce or add to the specification by negotiation if the client's requirements, extent of the scheme or process of realisation are changed.

Services required

The Project Manager will help procure and lead a Project Team to support the Client/Pailton White Lion Working Group (PWLWG) in all aspects of the planning and progression of the project through the Development and Delivery stages of the project to completion and handover, (subject to funding for Delivery stage being achieved).

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, while complying with all the requirements of the National Lottery Heritage Fund.

Specific role responsibilities are as follows:

RIBA Stage 1 – Preparation

- 1.1 Review current strategic plan with PWLWG to produce Project Definition Report

RIBA Stages 2 and 3 - Concept Design and Developed Design

- 2.1 Plan, coordinate and attend regular meetings with the client/PWLWG, design team and others throughout these stages to monitor progress.
- 2.2 Lead on the tendering for the Architect led Design Team, Quantity Surveyor, Structural and services Engineers, Interpretation and Activity Planning Consultant, Business & Marketing Consultant, Evaluation Consultant.
- 2.3 Take up the necessary references for each appointment and write the Tender Reports for submission to the Client/PWLWG and National Lottery Heritage Fund
- 2.4 Lead on the National Lottery Heritage Fund Mid-Stage Development Review coordinating all presentations and documents to be submitted.
- 2.5 Co- ordinate and oversee all the work to be undertaken by all the Project Team to deliver the required documents for the Round 2 submission.
- 2.6 Produce and maintain a detailed project Delivery Plan/ Project Gantt Chart. Operate a risk management process based on a comprehensive risk register to identify, analyse and respond to project risks.
- 2.7 Ensure all members of the Project team are aware of the tasks and responsibilities attributed to them. Maintain regular contact with all team members to ensure that any issues are identified with minimum delay and appropriate corrective action is taken where necessary.
- 2.8 Taking part in the Evaluation of the Development Phase
- 2.9 Organise, manage and report regular risk workshops throughout the project so that all risks are identified and strategies in place for their avoidance, mitigation or management.
- 2.10 Review and prepare cost plans in respect of RIBA Stage 2 Concept Design and submit to the Client/PWLWG.
- 2.11 Contribute as required to RIBA Stage 2 Project Progress Report and Concept Design Report for presentation to the Client/PWLWG, stakeholder and public consultation and to the Development review with NLHF
- 2.12 Obtain Client/PWLWG approval to proceed to RIBA Stage 3 Developed Design.
- 2.13 Contribute as required to RIBA Stage 3 Project Progress and Developed Design Report for presentation to the Client/PWLWG, NLHF and other

stakeholders at a RIBA Stage 3 Review meeting.

- 2.14 Prepare a cost and risk analyses for the repair and conversion works in accordance with the schedule of works for the works of repair and conversion prepared by the design team.
- 2.15 In conjunction with other members of the design team, assist the design team in the preparation of a ten year management and maintenance plan for the project, including preparation of costed schedules of cyclical maintenance.
- 2.16 Prepare and present all project, programme and costing information as might be required to compete the NLHF and other funding applications and to respond to assessor's queries.
- 2.17 Obtain Client/PWLWG approval to proceed to RIBA Stage 4 Technical Design subject to the approval of all funding and the confirmation of the Client/PWLWG that the project and appointment are to proceed

RIBA Stage 4 - Technical Design

- 3.1 Attend regular meetings with the design team and others in order to monitor progress and to take any action necessary to correct any risks, issues and variations that occur. Ensure the timely exchange of information between the members of the design team and client/PWLWG.
- 3.2 Advise on tendering and contractual procurement options. Prepare recommendations for the PWLWG's approval.
- 3.3 Prepare a pre-construction report summarising the Project design, cost, programme and risk register.
- 3.4 Obtain confirmation that required insurances are in place prior to commencement of works on the Site.
- 3.5 Procure any investigation and enabling works contracts required before the performance of the Building Contract.
- 3.6 Agree approvals required under the Building Contract.
- 3.7 Undertake regular Site inspections. Obtain progress and quality reports from site staff representing the Contractor.
- 3.8 Agree all test certificates and statutory and non-statutory approvals required. Prepare recommendations for the Client's approval.

- 3.9 In co-operation with the design team assist in the preparation of a detailed programme for the preparation of design and production information leading up to obtaining tenders for the Works.
- 3.10 Attend consultation events as required by the Client/PWLWG and partner organisations. Incorporate outcomes as agreed with the client.
- 3.11 Contribute as required to RIBA Stage 4 Project Progress and Technical Design Report for presentation to the Client/PWLWG, NLHF and other stakeholders at a RIBA Stage 4 Review meeting.
- 3.12 Ensure timely updated cost plans delivered throughout the design phase to ensure costs targets are met and advise the design team as necessary.
- 3.13 Where the Client/PWLWG has indicated the possibility of a change to the agreed brief during the design phase, inform the Client/PWLWG of the cost and programme implications and obtain the Client/PWLWG's instructions.
- 3.14 Ensure that life cycle costings are applied to the design for the project and that solutions giving the best overall value for money are adopted and, where this may result in the cost limit for the project being exceeded, make recommendations to the Client/PWLWG and obtain instructions.
- 3.15 Advise and support the assessment of procurement options for the main or other contractor roles and ensure all necessary all other documentation for the letting of contracts for the project.
- 3.16 Make contract procurement recommendations to the Client/PWLWG and obtain instructions.
- 3.17 Advise the client on the content and assessment criteria for the Pre-tender Qualification Questionnaire. Support the Client/PWLWG in the implementation of the first stage selection process.
- 3.18 Support the Client/PWLWG in implementing a tender process compliant with Public Procurement Regulations 2015 or subsequent regulation.
- 3.19 In liaison with members of the design team, make recommendations to the Client/PWLWG on the suitability of contractors who may be invited to submit a tender for the main works and any specialist works and obtain instructions.
- 3.20 In liaison with members of the design team, ensure that all drawings, specifications, schedules, Bills of Quantities or other documents necessary for the placing of contracts are completed and are fully coordinated, are in accordance with the brief approved by the Client/PWLWG and are available on the programmed date.
- 3.21 Complete a pre-tender estimate based on the tender documentation.
- 3.22 Agree with the Client/PWLWG final arrangements for the obtaining and assessment of tenders.
- 3.23 Undertake risk assessments as required, including by regular risk workshops and ensure that risks are appreciated by all team members and mitigation is coordinated and implemented.
- 3.24 Undertake value management exercises.

- 3.25 Assist as required in preparing and providing information to support the tender process, briefing tenderers, contract documentation, etc.
- 3.26 Assist the Client/PWLWG to deal with all enquiries from the contractors during the tendering period.
- 3.27 Together with the Client/PWLWG examine tenders received and, in liaison with members of the design team, make recommendations to the Client/PWLWG as to the adequacy or otherwise of the tenders.
- 3.28 Organise and attend any clarification or other meeting with tenderers.
- 3.29 Organise as required in any clarification or adjustment process pre contract.
- 3.30 Undertake full post tender analysis and prepare post tender reports.
- 3.31 Report the outcome of the tender and obtain the Client/PWLWG approval to proceed to Stage 5 Construction.

RIBA Stage 5 – Construction

- 4.1 In liaison with the other members of the design team, provide the Client/PWLWG with documents necessary for entering into contract.
- 4.2 Undertake risk assessments as required.
- 4.3 Undertake value management exercises.
- 4.4 Provide a detailed programme for the Works with the Contractor which specifies completion by the agreed date.
- 4.5 Organise and/or attend meetings with the Contractor or with others as required
- 4.6 Attend regular meetings with the design team to review design information and monitor the distribution of that information to the Contractor and the other Consultants as may be necessary.
- 4.7 Until completion of the project, continue reporting to the Client/PWLWG in accordance with procedures established under Stage 3.
- 4.8 In compliance with the selected contract form and in liaison with the Client/PWLWG and members of the design team, establish and implement post contract Change Control procedures.
- 4.9 Manage QS services to include monthly valuations and variations up to and including the final account.
- 4.10 Prepare with QS a monthly progress and valuation report detailing contract expenditure to report to the Client/PWLWG.

- 4.11 Until completion of the project, report to the Client/PWLWG at monthly or such other intervals as agreed on the progress of the Works.
- 4.12 Attend regular meetings with the Contractor and members of the design team as necessary in order to monitor the progress of the Works and the production of design information to the Contractor.
- 4.13 Provide written reports and monitoring statements as required to satisfy the requirements of the funding bodies and support the Client/PWLWG t's Project Coordinator/Manager in making interim grant claims.
- 4.14 Inform the Client/PWLWG of any contractual difficulties which may arise during the course of the contract and obtain the Client/PWLWG's instructions.
- 4.15 Inform the Client/PWLWG of any changes to the anticipated Practical Completion date of the Works.
- 4.16 Agree approvals required under the Building Contract.
- 4.17 Agree all test certificates and statutory and non-statutory approvals required. Prepare recommendations for the Client/PWLWG's approval.

RIBA Stages 6 and 7 – Handover and Close Out and In Use

- 5.1 Assist the design team in updating the Management & Maintenance Plan as required.
- 5.2 Liaise with the Contractor to oversee preparation and maintenance of a defects administration plan, or similar management tool, to identify the roles and responsibilities of the Client/PWLWG and the Contractor.
- 5.3 Facilitate agreement to the final account or similar financial statement from the parties to the Building Contract. For the purposes of this clause the final account or similar financial statement excludes the assessment of loss and expense claims.
- 5.4 Advise on the recovery of liquidated and ascertained damages.
- 5.5 In liaison with the design team, organise and attend a Client/PWLWG handover briefing to ensure that all services and systems operations are demonstrated to the Client/PWLWG and End Users, and that all documentation requiring sign off at handover is completed.
- 5.6 Prepare a final valuation of the Works and report the final cost of the Works to the Client/PWLWG.
- 5.7 Liaise with members of the design team to issue the Final Certificate and any other documentation required by Client/PWLWG in satisfying the completion requirements of NLHF and other funders.
- 5.8 Ensure a valuation for insurance purposes is provided, if required.

Timetable

The contract will run from Sept 2022 to December 2025 with a stand down period when the application is being assessed. Key dates for design, mobilisation and build are provided in Table I, (page 18).

The capital budget for the capital works is £1,522,000 (excluding VAT).

Resource specification

The Project Manager (PM) will have a track record of working successfully in the heritage sector and with Grade II listed buildings and conservation areas. They should have experience of working with Parish Councils/CICs.

The PM should have an understanding of the project and the drivers leading to a successful scheme. They should also understand the likely challenges during the life of the project and how to mitigate them.

Deadline

Completed tenders should be returned by email by 5pm on 31st Aug 2022 to Tina Simpson (Pailton Parish Council Project Lead) at tinapailtonpc@gmail.com with a copy to clerk@pailtonparishcouncil.org.uk No questions will be accepted after 19th Aug 2022.

It is the Tenderer's responsibility to ensure that they are received on time. If you would like to visit the White Lion, then we will be arranging a series of dates for walkthroughs.

Fee

The fee for the Development Phase of work must not exceed £25,000 excluding VAT.

The fee for the Delivery Phase of work must not exceed £30,000 excluding VAT. This must include all expenses.

Insurance

The Project Manager will hold Professional Indemnity cover set at £2M, Public Liability at £5M and Employer's Liability at £10M.

Interview date

The PPC may hold clarification meetings. These will comprise of a 20 minute presentation from the tenderer followed by a 20 minute question and answer session based on the tenderer's submission.

Tender submissions – please read carefully

The purpose of the tender response is to enable the PPC to evaluate your understanding of our requirements, the suitability of your proposed approach and experience and skills of your team. Your response should consist of the following:

A written response to the evaluation criteria below.

- Ensure your responses relate to the project brief. Do not include generic information. Any general marketing material about your company or additional appendices that have not been requested will not be considered.

A priced offer in the format request.

- 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.

Signatures of appropriately authorised individuals e.g. where the tender is a Limited Company, by a Director; where it is a Partnership, by two authorised partners or by an individual if they are a sole trader. Signatures can be scanned.

Evidence of appropriate insurances. All consultants should have Public and Professional Liability and Companies Employer’s Liability if they have employees.

Evaluation criteria

Tenders will be evaluated according to the following four criteria:

- Relevant project management experience (preferably) from two similar projects that have been completed within the last 3 years. Both should have been funded by the National Lottery Heritage Fund and one a listed building (30%)
- Qualifications and experience of the proposed team including CVs. No CV must be more than four sides of A4 (30%)
- Approach to the consultancy including details of communication with the Project Working Group (An advisory board) and CIC/PPC (client) (20%)
- Price (20%)

The PPC will assess Tenderers’ responses according to these criteria and will award points up to the maximum shown against each heading in the Quality evaluation assessment table below. Failure to achieve a rating of satisfactory (i.e. a minimum unweighted score of 3 or above) in any one or more categories may result in the bid being disqualified at the PPC’s discretion.

Assessment Criteria	Score
Unacceptable: either no answer is provided, or the answer fails to demonstrate that any of the PPC’s key requirements in the area being measured will be delivered.	0
Poor: fails to demonstrate how the PPC’s basic requirements in the area being measured will be addressed, giving rise to serious concerns that acceptable outcomes would not be delivered against the project brief.	1
Weak: barely demonstrates how the PPC’s basic requirements in the area being measured will be addressed, giving rise to concerns whether acceptable outcomes would be delivered against the project brief.	2
Satisfactory: demonstrates how the PPC’s basic requirements in the area being measured will be addressed so as to deliver acceptable outcomes against the project brief.	3

Good: demonstrates how most of the PPC's requirements in the area being measured will be addressed so as to deliver good outcomes against the project brief.	4
Excellent: demonstrates clearly how all of the PPC's requirements in the area being measured will be fully addressed so as to deliver excellent outcomes against the project brief.	5

Please note the following:

The tenderer who submits the lowest overall price will receive the full score of 20% available for the financial evaluation. Remaining bids will be awarded a score proportionate to the lowest priced bid according to the following formula:

$$\text{Score} = (\text{lowest bid received} / \text{bid price}) \times 20$$

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.

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.

Tenderers may seek clarification on any of the points contained in the tender documents at any time **prior to seven working days** before the date for receipt of tenders. This will allow time for the PPC to prepare a response to all tenderers by five days before the tender deadline and for all tenderers to incorporate the clarification prior to the tender deadline.

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.

APPENDIX A: Form of Tender

Please complete this form and include it with your responses to the questions above.

Project: Save The White Lion

Professional Service: Project Management Services

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 (RIBA Stage 2/3)

£ ____plus VAT for the delivery phase (RIBA Stage 4 to completion)

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:

	Development phase		Delivery phase	
Team	Day Rate £	No. of days	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	

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.

Capacity in which signed	
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Table 1, Timetable for Delivery of the Project - V4

Task	Start Month/YR	End Month / Yr
Development Stage milestones		
Appoint project manager (PM)	Aug-22	Sep-22
Tender Project Team (PT)	Oct-22	Dec-22
Consultant Appointment & Start-Up	Dec-22	Dec-22
RIBA stage 2 works and sign off	Dec-22	Apr-23
RIBA 3	May-23	Oct-23
NLHF round 2 application	Nov-23	Nov-23
Round 2 approval	Mar-24	Mar-24
Delivery Stage milestones		
Round 2 Permission to Start	Apr-24	Apr-24
RIBA 4 and main contractor procurement	Apr-24	Jun-24
Capital works	Jun-24	Jun-25
Internal fit out	Jul-25	Aug-25
handover and opening	Sep-25	Oct-25
Contract defects period	Jun-25	Jun-26

