



***WICKSTEED CHARITABLE
TRUST***

Heritage Lottery Fund Application

INVITATION TO TENDER

**Consultant's Brief –Preparation of an Activity Plan for
Wicksteed Park - @ Play – Yesterday, Today and
Tomorrow
(Development Plan Stage for Round 2)**

Closing Date for Tenders:

12:00 hours 2nd March 2018

Contents

The enclosed Invitation to Tender consists of the following documents.

Glossary of key terms

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- Tender Return Sheet Section 6
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To facilitate ease of completion by Tenderers, this document is issued as an editable word document. No changes shall be made to the format / wording issued by the Client. For the avoidance of doubt if the Tenderer does make any alterations to this document, these changes shall be deemed to not be legally binding.

GLOSSARY OF KEY TERMS

A detailed description of the requirement, together with formal definitions of the most important terms and phrases, are given in the rest of the document and in any appendices. For tenderers' convenience however, the following key terms, which are used throughout this document, are defined as follows:

the Client	means The Wicksteed Charitable Trust, Wicksteed Park, Barton Road, Kettering, NN15 6NJ
Invitation to Tender	means this document, inviting Tenderers to submit a Tender for the architectural design and brief for Wicksteed Park within the @ Play Heritage Lottery Fund supported scheme.
Supplier	means the Supplier that may be appointed by the Client as a result of this tender exercise.
Services	means the requirements of the Client (as appropriate) for the Services as detailed within this document or may from time to time be agreed as the Services are completed.
Tender	means the Tender submitted by the Supplier to The Client for consideration.
Tenderer	means an organisation that submits a completed Tender in response to this Invitation to Tender.
HLF	means the Heritage Lottery Fund who are part funding the scheme

Part A – Instructions to tenderers

Section 1 The information, instructions and guidance provided in Part A and B should be used to complete Part C – Tenderer's submission

Introduction

- 1.1 A consultant is required to develop an Activity Plan for Wicksteed Park.
- 1.2 The Client has been successful in being awarded HLF Round 1 Development funds to assist with the Clients proposals.
- 1.3 The Client's proposals are summarised into the following areas
 - (i) The creation of a Heritage Play Area, including the refurbishment of the Round House.
 - (ii) The restoration of the Captains Lounge – as a Learning Centre; but allowing for elements of multi-use in line with the Clients Business Plan assumptions.
 - (iii) The restoration of the Rose Garden to better represent initial designs. Including the formation of new steps and a retaining wall allowing access.
 - (iv) Restoration of fountain and landscaping of existing car park at the south end of the Pavilion.
 - (v) The development of a detailed Activity Plan.
 - (vi) The design and implementation of an innovate Interpretation Scheme which fully understands the heritage of 'children at play', invigorates and teaches its audience about the importance of Wicksteed Park.
- 1.4 The Client has agreed with the HLF a project delivery timetable and this is included for Tenderers information within the supporting information. Tenderers are required to have reviewed the timetable and be accepting of the key milestones as part of their Tender.
- 1.5 The Supplier will be required to work collaboratively and closely with other appointed consultants who will be working with the Client in developing the HLF Round 2 submission.
- 1.6 We are seeking to appoint a Supplier for HLF Development Phase. The Client envisages delivery of the Activity Plan by its own staff on successful submission to the HLF. The Supplier however may be retained at the discretion of the Client for the HLF Delivery Phase.
- 1.7 The Client estimates that the available budget for this appointment will be £12,000 plus Value Added Tax.

Background Information

- 2.1 Wicksteed Park is one of the Midlands' best-loved parks. Since its opening in 1921, it has been firmly rooted in the philanthropic and socially responsible ideals of its founder Charles Wicksteed and it has served the people of Kettering and neighbouring

communities in many diverse ways for over 80 years. As the United Kingdom's pioneering early leisure park, it paved the way for large-scale open-air amusements, providing playgrounds and open space for local families who had no gardens of their own. Today, Wicksteed Park is an extremely popular family venue, which combines picturesque open parkland, with the unique atmosphere of a traditional English family resort.

- 2.2 Wicksteed Park is of huge importance to local and regional heritage and is registered Grade II on the Historic England Register of Parks and Gardens of Special Historic Interest. Our Conservation Management Plan (prepared as part of the Lakes Restoration Project in 2012) rates the Park as having high significance in a National context and in terms of Charles Wicksteed's influence on children's play very high significance at the international level. The Park has great value to the local community and is used by many local organisations for events. The Trust runs an education programme, which involves a number of schools from the County, with up to 1,400 children attending events in any one-day.
- 2.3 As a key part of regeneration proposals for the Park, the Trust is developing a bid to the Heritage Lottery Fund (HLF) Heritage Grants Programme, with a total project value of about £2.4m. This will be the Second Stage of the regeneration programme, following the completion of the Lakes Regeneration Project. The Trust already has Round 1 approval. The bid will include proposals for restoration of the Park's historic landscape and refurbishment of Park buildings to provide new learning and heritage play facilities. Full details of the HLF Heritage Grants programme can be found on www.hlf.org.uk.
- 2.4 The Report and costings that the Tenderer produces will be included as part of our Second Round submission to be with the HLF by May 2019. Should your tender be approved we will be expecting that the Supplier delivers the consultancy between April 2018 and the date of which the Trust submits the Second Round submission to the HLF. As previously stated a detailed timetable for the development phase is included with the Supporting Documents.
- 2.5 The Trust has prepared a document entitled "A Vision for the Heart of Wicksteed Park" setting out initial proposals for consideration as part of the project. It sets out the vision for the Project :-

"To renovate the original heart of Wicksteed Park as the centrepiece and social hub of our restoration, environmental, community and educational agenda. To enhance the enjoyment of simple family play in line with the wishes of our founder, Charles Wicksteed, by means of restoring and preserving our unique heritage via sustainable investment".

- 2.6 All our proposals for the restoration and enhancement of the Park will conform to the following Policy documents:-
- Conservation Management Plan (August 2011)
 - Masterplan for the Park (November 2012 and more recent updates)
- 2.7 Our project will complement work planned for the next 2-3 years to be undertaken by the Trust itself. This will include:-

- Restoration of the historic heart of the Park as a Central Landscaped Piazza (‘the Octagon’), opening up an area which has been closed to the public. It will be surrounded by restored original bungalows used for community uses, the manufacture and sale of original Wicksteed Ice Cream and re-creation of a 1930s Wicksteed workers cottage. Historic views will be restored.
- The Precinct will be resurfaced and landscaped with the sympathetic retention of kiosks, retaining their original character and purpose
- Returning inappropriate car parking and access roads near the Pavilion to parkland and pedestrian areas.

Timescale

- 3.1 The included timescale that the Client has agreed with the HLF (included within the Support Documents) identifies that the bulk of the Supplier’s work will be carried out between April 2018 and January 2019.
- 3.2 Throughout the programme the Supplier will be required to ensure that Project Meetings or alike, called by the Client or HLF are fully resourced.

Section 2 - Instructions for Submissions of Tender

General Information and Instructions

- 1.1 Tenders submitted shall be in accordance with and subject to the terms of these instructions and other documents comprising the Tender.
- 1.2 Tenders not complying with any mandatory requirement indicated by the word 'shall' or 'must' may be rejected.
- 1.3 During the tendering period, should clarification questions be asked by a tenderer, these and respective responses will be shared with other Tenderers.
- 1.4 All clarification questions should be issued to the Clients Representative 14 days before the Tender return date.
- 1.5 This Invitation to Tender does not constitute an offer and the Client does not undertake to accept the lowest or any Tender. The Client will not reimburse any Tendering costs.

Confidential Nature of Tender Documentation and Bids

- 2.1 Tenderers must hold information relating to this Tender process as confidential and to limit the dissemination of such information on a need-to-know basis.
- 2.2 Tenderers shall not discuss the bid they intend to make other than with professional advisers or joint bidder who need to be consulted. Bids shall not be canvassed for acceptance, discussed with the media or any other Tenderer or member or employee of the Client.

Preparation of Bid

- 3.1 Information supplied to Tenderers by staff or agents of the Client or information contained in any of the Client publications is supplied for general guidance only in the preparation of the Tender.
- 3.2 Tenders and supporting documents shall be in English and any contract subsequently entered into shall be subject to English Law.

Submission of Tender

- 4.1 Submissions shall be made in the form set out within this document.
- 4.2 The Client requires the Tender to be submitted electronically in PDF format and sent to darowen@kinverbusiness.com on or before the Tender due date.
- 4.3 Additionally, the Client requires the Tenderer to submit two sealed hard copies of the submission for inclusion into the successful Suppliers contract. The address for submission is given within this document and they should be addressed to the Managing Director, Wicksteed Park. They should be clearly labelled Tender Returns.

- 4.4 Tenders will not be accepted by fax.
- 4.5 Tenderers may be asked to clarify their Tender and other documents included as part of their submission and what is or is not included in the bid price.
- 4.6 **The Form of Tender needs to be submitted by the organisation which it is proposed will enter into a formal contract with the Client and shall be signed by persons of that organisation authorised to enter in to the contract.**

Section 3 Tender Submission Checklist

Part A

Please use and submit this checklist to ensure that your proposal is complete. Failure to complete and submit any of the following documents may result in rejection of the proposal.

Item	Provided by Tenderer Please tick to confirm
You must submit the tender in Adobe PDF format and two hard copies	
Qualitative submission	
Form of tender	

Part B – Clients Requirements

Section 4 - Evaluation Criteria

- 1.1 The Client will accept the Tender which is the most economically advantageous, i.e. a balance between fixed cost and service quality.
- 1.2 The overall Tender will be evaluated against the written response (service quality) based on experience and the requested information as well as the Tender sum (price)
- 1.3 The Client intends to score each submission on an 65/35 basis with 65% of the available score being awarded for quality and 35% awarded for price.
- 1.4 **Price 35%**
Where any tender is considered to be too low or too high to be credible then the Client will clarify whether the pricing is correct and has been interpreted correctly. If following the clarification, any price is found to be too low or too high, that tender will be rejected. Any Tender submission where prices are 30% below or above the median of all responses then the Client would consider these to be abnormal.
- 1.5 **Quality 65%**
The non-price/qualitative elements will be scored by the Evaluation Panel and will receive up to a maximum of 65% of the total scoring. It may be possible that all responses are judged equal and receive the same score. An interviewing shortlist process will then decide which bid is proven to be most acceptable.
- 1.6 Your response should include:-
- An outline of activities and milestones for the consultancy period (Development Phase)
 - Details of the expertise and experience of the people who will carry out the work, including roles and responsibilities of individuals on your project and CVs where appropriate
 - A fully costed consultancy proposal for the Development Phase (up to May 2019)
 - A resource plan showing the breakdown of chargeable hours between individuals and project stages for the Development Phase.
 - At least two examples of previous plans or similar documents
 - Confirmation that you possess or are willing to have in place the following levels of insurance. Claims values will be the maximum per individual claim and not aggregated to either a project duration or limited to a duration such as annually.
 - Public Liability £5,000,000
 - Employers Liability (if applicable) £10,000,000
 - Professional Indemnity £1,000,000
 - Three references for similar work undertaken within the last three years of similar nature and value.
- 1.7 Tenderers should note that the Client anticipates the need to hold interviews/presentations as part of the process to identify the Supplier. Tenderers submitting the top four scoring responses will be invited to conduct presentations and attend an interview.

- 1.8 The purpose of the presentation/interview will be to explore the validity of the initial evaluation and to confirm the Client's understanding of the Tenderer's proposals.
- 1.9 It is envisaged that the presentation/interview process will take approximately 1 hour in duration, with the presentation being 20 minutes and the remaining time being made up of a question and answer session.

The venue for the presentation and interview will be

Wicksteed Park
Barton Road
Kettering
NN15 6NJ

- 1.10 The Client has provisionally set aside the 19th March 2018 for these interviews/presentations to be undertaken.
- 1.11 Arrangements may be made to visit the Park and discuss the brief informally with the Trust's Project Manager, Darowen Jones. The following additional reports are available:-
- Wicksteed Park publicity material
 - Wicksteed Park website – www.wicksteedpark.co.uk

The inputs and skills of the existing staff and trustees at the Park are summarised in the Support Documents.

Section 5 - Statement of Requirements/Services

- 2.1 This statement of requirements and Services should be read in conjunction with the supporting documentation and all other elements of the tender information.
- 2.2 We are seeking proposals that are ambitious, adventurous, and exemplars of current practice that set the benchmarks for the future and respond to and celebrate our very special heritage. The use of multiple approaches to engagement and interpretation are welcomed, which should be designed through innovative action research activities that are both surprising and inclusive
- 2.3 The Supplier will be required to generate a plan which includes the following contents:-

Section 1 : Where we are now

1a Our Organisation

- Summarise the organisation's commitment to involving people; refer to key documents; describe any changes made since the first round application (e.g. to policies or strategies) and any that will be made during the project;

- Summarise the relationship between the heritage of Wicksteed Park and people; refer to key documents; describe any changes made since the first round application and any that will be made during the project; and
- Describe how the Activity plan was created, including: who has been involved in its writing; who has been involved in helping to develop our ideas for activities; what has been learnt from others and our past activities.

1b Audiences

- Summarise what we know about the audiences for our heritage at present, and how we know this; and
- Describe the potential audiences and any barriers to involving people, and how we know this (you should include an Access Audit for the area of the Project).

The information on audiences should be set out as an Audience Development Plan, referring to and updating previous relevant work; including the Outline Audience Development Plan (November 2007) prepared by Imagemakers and parts of the Activity Plan (December 2011) prepared by Pathways Consultancy Ltd.

You should:-

- Demonstrate how we will gauge the range of people experiencing the heritage of the Park and what people think of the offer.
- Set out a programme of participation and consultation (focus groups, consultation with schools and community groups, workshops) – use the results of our Visitor interview Surveys and work already completed for our Lakes Activity Plan as a starting point. Use quantitative and qualitative research.
- Identify strategic priorities for audience development and increasing people's engagement with the heritage – use of young people's panel, testing ideas for interpretation with target audiences, better relationship with local community, different ways of presenting our heritage and "telling the story". Outreach activities to raise awareness and reach new audiences, new and innovative ways of marketing the heritage.

1c Activities

- Describe what we currently offer the public;
- Describe how our present audiences value the activities we offer, and how we know this;
- Describe how potential audiences value our heritage and the activities we offer, and how we know this; and
- Describe what we would like to do to build on good practice in other organisations.
- Review the existing Round 1 Activity Plan identified and use as a basis for further development

Section 2 : Strategic decisions about involving people

- Set out our aims for involving people which will be realised through the activities in our report;

- Set out how the project fits with our organisation’s overall activity and is guided by our strategy and policies, and demonstrate our organisation’s commitment to putting the activity plan into action;
- Summarise the choices we have made about audiences for our heritage in the project and tell us why these audiences matter to us;
- Give a concise description of what we will do to involve people with the heritage;
- Give an overview of the kinds of activities we will do and our reasons for choosing them;
- Summarise how we are meeting the HLF’s aims for learning and for participation;
- Give a structure chart for the management of the activities in the project, job descriptions for project staff (with salaries) and volunteers, and briefs for any freelance workers or consultants;
- Set out our plans for how we will handle any potential difficulties in involving people with our heritage;
- Summarise our measures of success for involving people and our plans to evaluate our activities;
- Set out broadly what will happen once the project is complete to ensure the long-term benefits
- Set out how our organisation will be different after the project and how we will continue to develop;
- Set out how we will share the lessons of our project; and
- Give a summary of the budget for the activities.

Section 3 : Action Plan for our activities

- Our action plan (see template of the HLF’s “*Activity Plan Guidance*”).

Appendices (if appropriate)

- A summary and the full findings of each piece of research or consultation undertaken in the development period; and
- New or revised policies relating to involving people.

Documents

The Supplier should note further Support Documents are available on request via email to darowen@kinverbusiness.com

- 2.4 The Supplier should involve the following stakeholders in the plan, and manage a programme of involvement and consultation:
- The Wicksteed Charitable Trust
 - People directly involved in caring for the asset (Wicksteed Park staff and volunteers)
 - Users (people who use the asset or live or work in the area)
 - Wider-interest groups (community and interest groups, societies and specialist advisers)
 - Statutory organisations (local planning authorities and agencies)
 - The Park’s Education Officer

- 2.5 The consultant will be responsible for the programme of involvement and consultation.
- 2.6 The project manager will be responsible for making sure that the Client adopts the plan, and that staff go to meetings.
- 2.7 The Supplier will be required to sign up to the applicable form of Contract. The Supplier as part of their Tender can propose a form of contract for review by the Client. The Client reserves the right to propose the form of Contract.
- 2.8 Payments will be made at the following stages:
- Monthly in line with the proposed payment schedule proposed by the Supplier.
 - Final payment at end of contract
- 2.9 Where proposals may include external third parties, the Supplier will act as the Principle Consultant and will be required to enter into similar agreements with any third parties so as to ensure the Client receives the same level of service throughout the supply chain.
- 2.10 Any third-party consultants/contractors who are engaged by the Supplier to work upon part or whole of the Services will be required to enter in to Collateral Warranties in favour of the Client on appointment. Resultant costs of these are to be included within the Tender.
- 2.11 The Supplier will be expected to attend progress meetings as a member(s) of the Project Team at regular intervals. It is envisaged that there will be 6 project meetings and the HLF mid-project review. The first Project Team meeting is intended to be held in April 2018. The Supplier should allow for additional attendance to meetings as may be so required to assist the development of the overall project development.
- 2.12 In line with the HLF Stage 2 Development timetable, the Supplier will be required to submit all initial drawings, layouts and artists impressions by August 2018.
- 2.13 Further iterations of drawings, layouts and artists impressions should be submitted by January 2019 for approval by the Client.
- 2.14 The Client will own the copyright for the plan and all documentation produced. The Client may be willing to enter into discussions regarding a licence for the appointed consultant to use the documentation for marketing purposes and alike.
- 2.15 Your tender should be returned to Darowen Jones, Wicksteed Trust, Wicksteed Park, Barton Road, Kettering, Northants NN15 6NJ by **midday on 2nd March 2018.**

Part C – Tenderers Submission Document

Section 6 – Tender Return Sheet

(to be completed and returned by the Tenderer)

For the supply of a
**Consultant’s Brief –Preparation of an Activity Plan for
Wicksteed Park - @ Play – Yesterday, Today and
Tomorrow
(Development Plan Stage for Round 2)**

Name of Tenderer
Activity Plan Development
Activity Play Delivery

1. To assist Tenderers a checklist for a complete response is provided at the front of this Tender Document (see Part A – Section 3).
2. Tenderers should complete this Tenderer’s Submission Document, and insert it at the beginning of their Tender submission where it can be easily found and identified.
3. Tenderers should cross reference any other documents submitted with their Tender to the applicable section in this Tender Submission Document so that it is easy for the Client Evaluation Team to identify the Tenderer's full response to each requirement.

Section 7 – Form of Tender

To: Wicksteed Charitable Trust (the Client)

Having examined carefully and understood the Invitation to Tender for the above Contract including without limitation the Support Documents and all relevant information held electronically via the Wicksteed Park website

• In consideration of you considering this Tender:

1. We offer to deliver the services to the Client for the prices submitted by us in the Forms of Tender and deliver the project in accordance with our Tender submission.
2. We agree that this Tender shall remain open for acceptance and shall not be withdrawn for a period of not less than 90 days after the Tender return date.
3. We agree that unless and until a formal contract is prepared and executed the offer set out in this Tender constitutes an irrevocable offer by us which shall be capable of acceptance by you whereupon, unless otherwise stated, there shall be constituted between us a binding Contract.
4. We confirm that we have enclosed with this form of Tender the following documents comprised in our Tender Documents:-
 - Pricing Schedule(s)
 - Response to the Statement of Requirement/Specification
 - Technical information as necessary
 - And any other documents that have been requested
5. We understand that the Client are not bound to accept the lowest or any Tender it receives and we bear our cost of Tendering
7. We note and accept the confidentiality provisions in the Tendering Instructions.
8. We warrant:
 - 8.1 All information in our Tender response is complete and accurate;
 - 8.2 We have made our own investigations and research and have satisfied ourselves in respect of all matters relating to the Invitation to Tender and acknowledge that information in the Invitation to Tender provides general guidance only;
 - 8.3 We have full power and Company to enter into a contract to perform the obligations specified in the Tender Documents;
 - 8.4 We are of sound financial standing and has and will have sufficient working capital, skilled staff, equipment and other resources available to perform the obligations specified in the Tender Documents;

*(delete paragraph 5 if not applicable)

Dated this _____ day of _____ 2018

Company**

For and on behalf of:

(Print business' full name)

(1) Signature

** (2) Signature

.....

.....

(Director)

(Director/Secretary

Name

Name

.....

.....

Job

Job

Title/Designation

Title/Designation

.....

.....

Registered
Address

Company registration number:.....

Sole Principal/Partnership**

(Print business' full name)

For and on behalf of:

(1) Signature

** (2) Signature

.....

.....

Name

Name

.....

.....

Job

Job

Title/Designation

Title/Designation

.....

.....

Business
Address

** delete as
applicable



Sustaining and transforming our heritage

THINK before you PRINT