

www.rbwm.gov.uk



Royal Borough
of Windsor &
Maidenhead

Borough Wide Heritage Strategy and Action Plan

Invitation to Quote/Brief

April 2019

Brief for a Borough Wide Heritage Strategy and Action Plan for The Royal Borough of Windsor and Maidenhead

Introduction

The Royal Borough of Windsor and Maidenhead has a rich history, and many national and internationally important historic buildings and places. It includes towns and villages, designed and rural landscapes and extensive stretches of the River Thames. All these elements contribute to the Borough's unique identity, its culture and economy.

The Council's emerging Borough Local Plan provides for the development of a Heritage Strategy SPD and the Council is now seeking to appoint a consultant to draft a community led Heritage Strategy and Action Plan. These documents will identify and celebrate the importance of the Borough's heritage, provide strategies for its protection and enhancement, and consider how best to interpret and harness this special resource for the benefit of the community, visitors and the local economy.

Key elements of the project

The Borough includes a number of diverse communities, for whom heritage will have many different meanings. It is essential that these groups, in particular those who would not normally be participate in heritage projects, are identified and involved, so that their views are included.

Heritage is also an important learning tool for developing knowledge and new skills. History belongs to us all, it can be exciting and inspiring, and the simple enjoyment of a new discovery is something that everyone can benefit from. The project will consider how best to maximise the educational benefits of the Borough's heritage for the community and for visitors. It should provide viable proposals for how this can be achieved, which will include how the Council and the wider community can make best use of existing cultural assets and resources.

Partnership will be a priority for the project. To achieve this, community and business networks, together with locally active heritage organisations will need to be identified and consideration given to how they can best work together. By establishing mutually beneficial partnerships, the synergy created between these groups will have the potential to provide significant heritage and economic benefits. Opportunities to improve the Borough's heritage "offer" for visitors, as well as improved marketing and management of historic areas, will need to be considered, and strategies proposed to maximise their potential. Options for future project funding and investment will also need to be explored.

Not only is heritage an important element in creating a sense of place and belonging, but it can also be a catalyst for regeneration. There are parts of the Borough, such as Maidenhead, where this is particularly important and the strategy will set out priorities and proposals for improvement within these areas, whilst linking with existing Council objectives and strategies. Within the area there are also major infrastructure projects ongoing, and proposed, and these will have an impact on how the Borough looks and functions in the future. The strategy will need to maximise the potential opportunities that these changes will bring.

It is important that the Heritage Strategy and Action Plan documents are provided in an attractive and readily accessible format that can easily understood by all interested parties. It is anticipated that the Strategy will initially be for a fifteen year period, but it should be designed as a rolling document to be updated as required by the Council. The Action Plan will be a separate document that will dovetail with this and should be designed so that it can be easily reviewed and updated annually.

Funding

The funding for this project comes from the Planning Delivery Fund, although there is also the possibility of grant assistance from Historic England for some elements of the scheme. Whilst the Council will consider good value for money when assessing bids, these will also be assessed on the basis of the appropriateness, quality of the proposed project, and the experience and expertise offered by the prospective team.

Scope

Key objectives

- To provide a shared future vision for the Borough's heritage, formulate a strategy with viable objectives and a long term program for achieving this (Action Plan)
- To support and work in partnership with stakeholders to address heritage issues to achieve social, cultural and educational gains, and promote commercial success
- To understand what heritage means to the community and what it values
- To understand the issues surrounding the Borough's heritage, its benefits and problems
- To promote and raise the profile of the Borough's heritage by proposing, for example, improvement projects, town trails, guidance, improved interpretation, award schemes, events, and by the use social media/technology
- To provide guidance on how to manage and market heritage assets to maximise their community and commercial benefits
- To create a gazetteer of heritage assets, designated and non-designated

- To propose a framework to guide and monitor the long term progress of the Strategy and Action
- To provide documents in an attractive and readily accessible format that can easily be reviewed and updated by the Council and are compatible with Council systems

Summary of work required

This work will be progressed as a community project, with the consultant as lead, the work will include to:

- Organise and run an initial workshop for all stakeholders
- Form a steering group to guide the project, and support the election of a chairman
- Run 4-5 meetings of the steering group to identify issues, strengths and opportunities, priorities and objectives- to form the basis of the Heritage Strategy.
- From objectives create a list of actions to form the basis of the Action Plan and its projects
- Action Plan projects to be discussed and agreed with the steering group
- Process for the implementation and review of both Strategy and Action Plan to be agreed with steering group
- Liaise with Council leads/client group, provide regular updates and monitoring reports- these may include video conference calls and updates by email subject to agreement with the Council.
- Create an interactive web page for project and provide social media updates
- Assist with the setting up of a urban room for the project
- Consultant to provide draft documents for approval, including layout and artwork/photography.
- An inception report outlining the scope of the project and how it will be achieved is required, following this a draft Strategy and Action Plan for agreement are to be submitted, and following public consultation, final reports submitted for Cabinet approval- see timetable.
- Consultant to produce documents to agreed formats and to meet agreed target dates

Project Timetable

| Key Milestones | Date |
|---------------------------|---------------|
| Deadline for quotations | May/June 2019 |
| Appointment of consultant | June 2019 |

| | |
|---|-----------------------|
| Project inception meeting | June/July 2019 |
| First draft of inception report | August 2019 |
| Feedback from LPA on inception report | September 2019 |
| First draft of Strategy and Action Plan | April 2020 |
| Final draft of Strategy and Action Plan | April/May 2020 |
| Public Consultation on draft documents | May/June 2020 |
| Final report incorporating post consultation amendments | July 2020 |

The final project timetable will be reviewed and agreed during the inception stage of the project

Information required/available

The baseline information to inform this process will include an overview of current Council Strategies/ policies/ objectives. Consideration of the HERS (LBS, CAs, Registered Parks, Local List, SAMS, etc) and Historic England Building's At Risk Register. An assessment of currently available economic and tourism information, and familiarisation with the Council's and other local organisations archives and collections. Other relevant documents include the Borough Townscape/Landscape Assessments, Conservation Area Appraisals, the Local Plan, emerging Borough Local Plan and Local Plan Documents, SPDs and SPGs, Maidenhead Town Centre Action Plan, Neighbourhood Plans and associated documents. Other major local initiatives include Crossrail, M4 Smart Motorway and Heathrow 3rd Runway.

All GIS data will be supplied as ESRI shape files. Provision of GIS to a third-party is subject to the signing of a Contractor's Licence as provided under the Public Sector Mapping Agreement (PSMA).

Contractual requirements & fees

Fee payment will be subject to agreement, but up to three payments may be considered, e.g., one third at the completion of inception report, one third on the completion of the draft report and one third on Cabinet approval of the completed document following public consultation.

Invoices should be submitted at appropriate milestones as noted above. The invoices will be submitted against an RBWM Purchase Order. The Purchase Order will be based on the requirements of this specification and the accepted consultancy quotation.

The work undertaken by the consultant will be in accordance with this brief and the terms of the Purchase Order. No variation or deviation from this brief will be accepted without prior written approval from RBWM. Any agreed change or extension to the brief, or to the accepted quotation, will need to be supported by a new purchase order if a fee change incurs as a result of the changes.

Unless otherwise agreed with the Insurance & Risk Manager, the minimum levels of cover will be £5 million for public liability insurance, £2 million for professional indemnity insurance and £10m for employer's liability.

The key RBWM points of contact will be the Project Director and Manager and all contractual communications must be directed through them. Other officers in Conservation Team will assist as appropriate.

| | | |
|------------------|---|---|
| Project Manager | Sarah Harper Principal Planning Officer – Policy, RBWM | sarah.harper@rbwm.gov.uk Tel. 01628 796429 |
| Project Director | Victoria Goldberg Planning Enforcement and Conservation Team Manager, RBWM | victoria.goldberg@rbwm.gov.uk Tel. 01628 796447 |

Quotations

Quotation submission

The consultant should provide a quotation for the entire project. Please provide an itemised breakdown for each of the five stages below:

- Draft Inception report
- Draft Heritage Strategy and Action Plan
- Final draft of the Heritage Strategy and Action Plan
- Consultation during drafting and for final document
- Preparation of final document for adoption

You should include reasonable expenses and costs in the above, including for an inception meeting and progress meetings.

To allow for any additional work not specified in this brief, for example presentations to Members of the emerging results, please also include a further hourly rate, ½ day rate and day rate for key personnel.

Consultants should submit their quotation to victoria.goldberg@rbwm.gov.uk by **5pm** on ******* 2019**. Submissions received after this will not be accepted.

Please be aware that the responses to all clarification questions will be shared with all bidders, with the requesting bidders' details removed. Bidders seeking clarification or from the procurement exercise contacting RBWM employees outside of this procurement exercise may be excluded from evaluation and interview.

Quotations will be evaluated in the following ratios:

| Element of the Evaluation | Percentage Weighting |
|---|-----------------------------|
| Price | 40% |
| Quality (Understanding of the requirements in the specification, proposed methodology and team) | 60% |

Please provide a comprehensive description of how you will deliver this project, which will encompass these bullets:

- Demonstrate an understanding of community involvement and how this would be applied to the development of this Heritage Strategy and Action Plan.
- Provide details of the proposed methodology, including how the consultant would respond to the requirements of the brief. Particular attention should be given to timetabling and outputs.
- Provide examples of similar heritage projects the consultant has undertaken with references.
- Details of team members who will be undertaking the work, including sub-contractors, and their experience/CVs.
- Confirm that undertaking this project would not give rise to conflicts of interest
- Provide references.

The quality of submissions will be scored using the scoring matrix below.

| Score | Rating of Response |
|--------------|---|
| 0 | No response provided and/or substantial omissions which make the response fundamentally unacceptable and gives the Authority cause for major concern. |
| 1 | Very poor standard of response; fails to meet nearly all requirements, Insufficient information provided or response generally not supported by evidence. Gives the Authority cause for a very high level of concern. |
| 2 | Poor response; fails to meet the majority of requirements, insufficient information provided and/or response is generally not supported by evidence. Gives the Authority cause for a high level of concern. |

| | |
|----|---|
| | |
| 3 | Inadequate response; fails to meet some requirements and is generally unsatisfactory and/or has omissions and/or is not supported by evidence. Gives the Authority cause for serious concern. |
| 4 | Basic response; borderline in meeting requirements and has some satisfactory elements but is generally unsatisfactory and/or has several omissions. Gives the Authority cause for concern in several areas. |
| 5 | Adequate response; generally meets requirements and is supported by a reasonable level of evidence but has a number of omissions which give the Authority cause for some concerns in few areas. |
| 6 | Competent standard of response; meets requirements and is supported by a satisfactory level of evidence although there are a few issues which give the Authority cause for some minor concerns. |
| 7 | Good standard of response; meets requirements and is supported by evidence although there are a few very minor omissions and/or very minor issues which gives the Authority cause for some very minor concerns. |
| 8 | Very Good standard of response; meets requirements and is supported by comprehensive evidence which gives the Authority a very good level of confidence. |
| 9 | Excellent standard of response; exceeds the requirements in a number of areas and is supported by strong evidence which gives the Authority a high level of confidence. |
| 10 | Exceptional standard of response; exceeds requirements in most areas and is supported by very strong evidence which gives the Authority a very high level of confidence. |

The financial 'price' responses will be scored by the calculation model displayed below and according to the formula:-

$$\text{Score of other bid} = 100 \times \frac{\text{Lowest bid total price}}{\text{Your bid total price}} \%$$

The lowest priced tender will be awarded 100% of the available financial score, (50%). All other tenders will then be pro-rated relative to this. If any of the other bid prices are double or more than that of the lowest priced tender that other tender will receive 0% of the available financial score.

Draft March 2019