

Procurement - Getting quotes and finding the right contractor or conservator



War Memorials Trust

Introduction

This helpsheet aims to outline how anyone undertaking a repair and conservation project on war memorials, and seeking a grant from a scheme run or administered by WMT, should identify the right contractor/professional advisor and get quotes/tenders for the work. This helpsheet is aimed at custodians and grant scheme applicants.

As many of the grants awarded by WMT involve public money (e.g. from government, local authorities etc.) it is essential that value for money can be clearly demonstrated and the process used are non-discriminatory, transparent and proportional to the contract being offered. This is especially important where public money represents more than 50% of the total project costs as these are deemed 'subsidised contracts'.

This means when choosing the contractor or conservator to work on your project you need to follow the approaches laid out in this guidance. This will ensure you achieve 'best value' for your project and are in-line with the Regulations around procurement. Failure to follow these steps is likely to mean your grant application is rejected. It can look daunting but approached correctly it will help you manage your project and ensure the best outcome for your war memorial.

Please read this helpsheet, and the relevant appendix, carefully and contact WMT if you have any questions.

Key issues

Total project cost

The total value of your project determines what steps you will need to take. The larger the sums of money involved the greater the requirements. However, all projects should seek to be as fair as possible when deciding who undertakes work.

It can be difficult to know what your project might cost when starting out. When thinking about the value of your project you should include initial surveys and investigations, professional fees, the building works but not VAT. If you want advice then WMT is happy to offer guidance.

Quotes/Tenders

In order to get costs for your project you will need to obtain quotes or tenders from contractors or conservators for what they would charge. It will help you to be aware what we mean by quotes and tenders:

- **Quote:** price offered by a supplier / contractor for carrying out the works based upon a specification provided by the supplier / contractor
- **Tender:** price offered by a supplier / contractor for carrying out the works for based upon a specification prepared by a professional advisor

Depending on your project cost, and the type of works, you will need to have either quotes or tenders. It is likely that projects under £10,000 (£20,000 in Scotland) will need quotes whilst projects over £10,000 (£20,000 in Scotland) will need a conservation-accredited professional advisor involved who will prepare a specification against which you will receive tenders.

Remember War Memorials Trust can only consider quotes / tenders from unrelated, separate companies. Some companies have several different trading names or there can be different bodies operating together in the same group. Always check the companies you are contacting are different. A company should state its company number on its website or be able to provide this when you call. The company number should also be provided on any quote / tender.

Selecting a contractor or conservator

All projects will need someone to do the work. It is worth spending time and care choosing a contractor or conservator.

If you have employed a conservation-accredited professional advisor, they should help find a suitable contractor or conservator for you.

If you are not employing a conservation-accredited professional advisor for the works, it is important to find a contractor or conservator with experience and knowledge of conservation work. This might be someone local or a specialist who works nationally. Ask for evidence of experience, ask about their skills and qualifications such as the Heritage Skills CSCS card or ICON accreditation, check references, go and look at other jobs that they have completed.

WMT cannot recommend anyone but can direct you to places to find appropriate contractors see WMT's helpsheet [Conservation Contractors](#).

When selecting which contractor or conservator it is important

- you operate a fair and transparent process. All those submitting quotes or tenders should understand what work is specified and how a decision will be made about who gets the work
- you have a reasonable period for preparation and submission of quotations or tenders by contractors. For simple projects allow at least two weeks and longer for more complex projects

Where a grant is being awarded WMT will need to be sure that proposed works are appropriate. This will relate to technical approaches and ensuring that best conservation practice is followed.

When speaking to contractors make sure they are aware that you may be applying for a grant. WMT has a range of [helpsheets](#) on its website which outline best conservation practice and the type of works, and appropriate methods, which would be eligible for funding. In addition, your contractors or conservators will be able to see the information required by WMT to enable an assessment to be made – the higher the quality of information provided the more efficiently WMT can process your application at all stages.

An example letter, [Invitation to quote for contractors and conservators](#) is available to help you obtain quotes.

Selecting a conservation-accredited professional advisor

Where your project has a total project cost of more than £10,000 (£20,000 in Scotland) you will have to involve a conservation-accredited professional advisor. Projects with a lower project cost may wish to involve a conservation-accredited professional advisor if they have a complex or unusual case, WMT can advise if this would be appropriate.

The professional fees for your conservation-accredited professional advisor can be included in your overall project costs and grant funding can contribute to these.

A conservation-accredited professional advisor can help you at all stages of your project:

- inspecting and advising on condition
- preparing a specification for the work
- obtaining quotes or tenders
- drawing up a contract for the works with the selected contractor
- complying with the requirements of the Construction (Design and Management) Regulations 2015
- administering the contract when works are on site
- complying with grant conditions

For the role of conservation-accredited professional advisor, the following **professionals** are accepted:

- Architects listed on the [AABC Register](#) at category 'A' or the [RIBA Conservation Register](#) at Specialist Conservation Architect level
- Chartered Architectural Technologist listed in the [CIAT Directory of Accredited Conservationists](#) at Accredited Conservationist level
- Engineers listed on the [Conservation Accreditation Register for Engineers \(CARE\)](#) Chartered Architectural Technologist listed in the CIAT Directory of Accredited Conservationists at Accredited Conservationist level
- Chartered building surveyors listed on the [RICS Building Conservation Accreditation Register](#)
- Architects listed in the conservation accreditation directory of the [Royal Incorporation of Architects in Scotland](#)

Where professional fees are expected to be under £1,000 one quote would be acceptable but we recommend that you get at least three quotations for these professional services. This is to ensure best value for money. This will also ensure you can show a competitive process was taken to select the appropriate adviser, should anyone query this. WMT is happy to offer guidance, contact us.

An example letter, [Invitation to quote for conservation-accredited professional advisors](#) is available to help you obtain quotes.

Specifying the Works

It may be difficult to know what works are actually needed on a project:

- If you have employed a conservation-accredited professional advisor, they will draft documents which specify the works required, drawings etc. These will then be supplied to the contractors to provide prices for the works and ensure the responses are comparable
- If you are getting quotes/tenders yourself, it is important to give contractors an outline of the work you require. This is known as a Method Statement. This will ensure that the quotes you receive are comparable. WMT can provide advice on preparing your Method Statement

As part of the grant application process all applicants submit a [Grants Pre-application form](#). When WMT assess this advice and guidance will be provided to assist with managing a project and specifying works. Please be aware you should carefully read all the information provided. If you are not sure on anything then ask. If you apply for a grant having ignored the advice provided you are likely to be rejected.

Sometimes WMT can undertake site visits but with 100,000 war memorials and a handful of Conservation Officers it is not always possible.

What factors will you use to choose your contractor or conservator?

For all projects you will need to decide what factors you will consider to award the contract for the work. Where a grant is being awarded WMT will need to be sure that proposed works are appropriate. This will relate to technical approaches and ensuring that best conservation practice is followed.

After that you need to decide what factors you will use to evaluate your quotes/tenders and make your decision on which contractor or conservator to select. You will need to decide on this early in your project as you will need to tell the contractors or conservators when you invite them to supply their quotes or tenders. The contractor or conservator who is successful in this process is the one to who you will award the contract to carry out your works.

When assessing quotes/tenders you have two options:

1. Price Only

Unless stated otherwise, price will be the assumed criteria on which the quotes/tenders will be assessed. This means the contractor submitting the lowest price will be appointed to carry out the work. We would **recommend** this for projects with a total cost of less than £5,000.

However, this method does not allow for giving consideration to the contractor's previous experience of similar work undertaken and references.

2. Price and Quality

In order to consider a contractor's previous experience and the quality of their submission as part of the quotation/tender evaluation process it is necessary, to ensure that the process is open and transparent, to make the contractors aware of the price and quality criteria you will use.

You will need to outline the information you want the contractor to supply when you write to them to invite them to supply quotes/tenders e.g.:

- Confirm if they have visited the memorial in person
- Availability based on the proposed timescales
- Examples of previous relevant experience
- References from previous clients

Plus, you need to outline the proposed weighting and scorings you will use e.g. price could account for 70% of your evaluation and quality criteria for 30%.

An example letter, [Invitation to tender for contractors and conservators](#) is available to help you obtain quotes.

To help you WMT's website has further information and an example [Price-Quality evaluation scoresheet](#) along with [guidance](#) on using the scoresheet. If you want to follow price and quality criteria option you will need to return your completed copies of these with your Application Form.

It is important to note that this option may result in the contract being awarded to a contractor or conservator other than the one who submits the cheapest price.

What you need to do for your project?

The requirements for your project will depend on the total project cost excluding VAT. To find out what you will need to consider which cost category your project will fall into from the list below.:

My project costs:

- **less than £5,000** go to [Appendix A](#)
- **between £5,000 and £10,000 (£20,000 in Scotland)** go to [Appendix B](#)
- **over £10,000 (£20,000 in Scotland)** go to [Appendix C](#)

Please note that this helpsheet is intended to offer informal advice and is a distillation of experience. The information contained in this helpsheet is not exhaustive and other sources of information are available.