

Procurement example letter: Invitation to quote for conservation- accredited professional advisors



War Memorials Trust

Introduction

Below is an example of an **Invitation to quote** letter to send to prospective **conservation-accredited professional advisors** to obtain quotations for them to manage your project.

Please note when using this example all items in *[red italics]* are where you will need to enter information based on your project plans. This document has been provided as a pdf rather than a Word document to avoid anyone downloading and sending out the template letter without making amendments to ensure it is appropriate to their project.

Information on when it is appropriate to use this template letter can be found in WMT's helpsheet [Procurement - Getting quotes and finding the right contractor or conservator](#) and the accompanying [Appendix C](#). If you have any questions about this please [contact us](#). It is better to ask first and ensure the right approach is taken at the beginning of a project than have to go back to redo things at a later date.

Example letter

Dear *[Madam or Sir]*,

Re: Invitation to quote, *[Nowhere war memorial cross, Nowhere High Street]*

As custodians of the above war memorial, *[Nowhere Parish Council]* is planning a repair project to be completed in time for *[Remembrance Sunday this year]*. Ideally we would like the work to be done during *[the first half of September but there is some flexibility with this]*.

[Photographs of the memorial and the areas in need of repair are attached. The memorial is publically accessible if you wish to visit the memorial in person. Please contact the Clerk, who is managing the memorial project, if you wish to meet at the memorial].

Please note that we plan to apply to War Memorials Trust for funding towards the costs so all works undertaken will need to be in-line with best conservation practice. War Memorials Trust's website, www.warmemorials.org has information on the grants available and the type of works eligible for support.

Services

The services required in relation to this project are as follows:

- *[Inspect the war memorial, assess the condition and prepare a suitable specification and any other necessary tender documentation in order to obtain competitive tenders for the work]*
- *having due regard for the guidance available from WMT*
- *in liaison with the [Parish Council] WMT to ensure specification compatible with funding criteria undertake the Services applicable to the role of Principal Designer who is in control of the pre-construction phase and will be required to comply in all aspects with the requirements of the Construction (Design and Management) Regulations 2015*
- *Obtain competitive tenders ensuring that the procurement process is compliant with the Public Contracts Regulations 2015; evaluate and award the contract, complete the contract documents.*
- *Administer the terms of the construction contract whilst the Project is under construction undertaking the full range of duties imposed on the Contract Administrator by the Works contract in accordance with the timescales therein, including (but not limited to) issuing all instructions and certificates and all*

activities in connection with the adjudication of disputes between the Client and the Contractor

- *Complete all the documentation and requirements around the grant application process and, if successful in obtaining a grant, fulfil all requirements of the Grant Contract, conditions and Completion Report]*

Criteria for Selection

[The successful quote will be decided on the basis of the price; subject to proof of conservation-accreditation from your professional body].

Deadline and information required

If you wish to quote for this project please submit your quote with the following information to the postal or email address below by *[5pm Thursday 28th February]*:

- *[your price itemised against the stages outlined above and showing disbursements (with VAT itemised separately, if applicable) for undertaking all the works above*
- *Any other works you feel are required or any amendments to the above items please*
 - *explain why these are proposed*
 - *itemise the additional costs for these separately*
- *Please advise if you visited the memorial in person*
- *Availability based on the proposed completion date*
- *Examples of previous relevant experience and two references from previous clients*
- *Proof of conservation-accreditation from your professional body]*

Contact

[Mrs A. N. Other, Clerk, Nowhere Parish Council, Council Offices, Nowhere High Street, Nowhere AB1 2CD. T: 01111 111 111, E: nowherepcclerk@theinternet.com]

Yours faithfully etc.

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.

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