

## BRIEF FOR QUANTITY SURVEYOR AND COST CONSULTANCY SERVICES

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### INTRODUCTION

The Foundation for Jewish Heritage (FJH – the Client) is seeking proposals from suitably qualified and experienced quantity surveyors for the provision of cost consultancy services for the Merthyr Tydfil Synagogue Project and the development of the National Lottery Heritage Fund (NLHF) Stage 2 application, and the subsequent delivery of the project on site.

### THE PROJECT

FJH works to preserve and find sustainable new uses for Jewish Heritage at risk, both in the UK and across Europe. In 2019, it purchased the Grade II listed former synagogue in Merthyr Tydfil, Wales, with the vision to transform it into a Welsh Jewish Heritage Centre (WJHC). The synagogue is the most important Jewish site in Wales representing shared Jewish and Welsh heritage. At the time of acquisition, the building had been empty and derelict for 17 years, and was continuing to deteriorate, with considerable risk that it would disappear from the landscape through a careless act of vandalism.

The Project will save, restore and reimagine the building, and celebrate its history and unique perspectives through the establishment and operation of the WJHC. The Centre will provide a national cultural and educational facility, delivering a programme and providing expertise across three areas: the synagogue, Judaism and Jewish culture, and Welsh Jewish history; Holocaust education; and tolerance education.

The Centre will include space for interpretation and activities, with a programme reflecting five themes:

- **Local history.** Jewish residents, their contribution to the area's development and the cross-communal interaction.
- **Welsh history.** The history and impact of Jewish communities throughout Wales across more than 250 years, the families and their journeys, the challenges and triumphs of integrating into Welsh society.
- **Judaism.** The values and traditions of the Jewish faith and how it was and is practiced in Wales, and the religion's links to the other Abrahamic faiths.
- **The Holocaust.** Addressed from a Welsh perspective to include the pre-World War 2 Kindertransport children, refugee artists who settled in Wales, and survivors who arrived after the War.
- **Inter-cultural dialogue and social cohesion.** The Jewish encounter with wider society and the parallels with other minority experiences, addressing contemporary issues around diversity, inter-cultural understanding and tolerance.

The building itself will be both a resource centre and a community facility, and will accommodate the following:

- Exhibition space for both a permanent display relating to the Welsh Jewish story (using artefacts, oral testimonies and digital presentation), and temporary and rotating exhibitions.
- Activity space to accommodate a broad range of arts, culture and educational programmes, including classes, lectures, workshops, seminars, events and festivals.
- Provision for a school's programme to support the 2022 New Curriculum for Wales, offering tailored Centre visits, teaching materials and core themes.
- A dedicated online resource, presenting all the Jewish artefacts and materials in Welsh collections/archives, further enhanced by oral testimonies from across Wales.
- Flexible spaces that can be hired for community and commercial use to generate income.
- Visitor services potentially including retail and catering support.
- External landscaping.
- Links to Jewish heritage trails across Wales.

Further information about FJH and WJHC can be found on the following websites:

- <https://www.foundationforjewishheritage.com/>
- <https://jewishheritage.wales/>

## **BACKGROUND**

Merthyr Tydfil synagogue was opened in 1877 and functioned as a synagogue until 1983 when the building closed due to the decline in the Merthyr Jewish community. The building was sold and used for new purposes that were not always sympathetic. The building became empty in 2004 and has remained so ever since. A new owner explored possible future uses without success. With no maintenance plan, the unoccupied building's condition deteriorated, exacerbated by the rear of the site attracting anti-social behaviour and vandalism.

Cadw listed the building as being at risk, and a site visit by the Royal Commission on the Ancient and Historic Monuments of Wales in March 2017 confirmed that the building had deteriorated badly, with large holes in the roof which meant there was serious water ingress and pigeon infestation.

FJH identified Merthyr synagogue as one of the most important synagogues in Europe that was in danger. In 2019, the Foundation commissioned a condition assessment and a structural condition report. In 2020, following its acquisition, FJH commissioned urgent holding repairs, part funded by Cadw, which included roof repairs, asbestos removal, sealing damaged windows, propping up the rear retaining wall, removal of pointing externally and plaster internally, repair of rainwater goods, removal of evasive vegetation, and environmental cleaning. A post-works survey identified the status of the building as improved but still vulnerable.

## **THE BUILDING**

Merthyr Tydfil synagogue is located in the Thomastown Conservation Area of Merthyr Tydfil and was designed by local architect Charles Taylor. It is a tall structure of snecked rubble facing stonework with ashlar bands and dressings, with a steep duo-pitch slate roof with red tiled ridges. The front elevation is gabled with three polygonal finials rising from its sloping parapet, flanked either side by shorter turrets with conical slate roofs. There is a Hebrew inscription over the door and a red sandstone dragon adorns the apex of the entrance bay pediment, a symbol of Welsh Jewish symbiosis.

The building has four floors with the first serving as the main synagogue space. The small lower ground floor was the location of a 'mikvah', which is a bath used for ritual immersion, and a stone Ark is located on the ground floor, now whitewashed, with large 10 Commandments tablets in black and gold. Both the turrets and the steeply pitched main roof are hung with Welsh slate, and the windows are set with leaded glass, the upper floors having roundels set with the Star of David furnished in coloured glass. The structure was listed as a Grade II\* building in 1978 "primarily for historic interest as the oldest remaining synagogue building in Wales built in heavy Northern Gothic style" (Cadw). However, it lost its star rating due to changes to the interior.

The building was the third synagogue location in the town when it opened in 1877, and the first purpose-built for a Jewish community that was growing as part of a general wave of migration into the UK from central and eastern Europe of Jews fleeing political turmoil and religious persecution, drawn to the Merthyr when it was Wales's largest town and a powerhouse of the Industrial Revolution. Jewish merchants, often starting as peddlers before establishing fixed shops, were well placed to serve a relatively well-paid workforce in a fast-growing town which lacked the usual amenities and shops. Although small, the Jewish community made a significant contribution to the economic, cultural and social life of the town in a range of endeavours including commerce and industry, literature and the arts, politics, academia and philanthropy.

It has been argued that the Welsh nonconformist nation adopted a 'reverential curiosity' towards the Jewish people. This has been explained as a natural affinity of two minority groups who had suffered oppression but maintained a proud sense of their own heritage, and Welsh nonconformity's perceptions of Jews as 'the people of the book', and the Welsh as one of the lost tribes of Israel.

As Jewish life disappeared from smaller Welsh towns, communal buildings were sold off and lost, which makes Merthyr synagogue one of the very few Jewish sites that remain extant, and the most important in Wales.

FJH has identified Merthyr synagogue as one of the most important at-risk synagogues in Europe. It is important to Welsh heritage and is recognised as one of the top five heritage sites in Merthyr. Saving the building has been a priority issue for the Council, and the local populace who cherish this much-loved local landmark. The building stands as an emblem of society's diverse nature and how one migrant community successfully integrated into Welsh life, delivering an important message for the Wales of today.

## **SCOPE OF WORK**

The appointed Quantity Surveyor will report to the Client Project Manager, and will work with a multi-disciplinary design team to contribute to the development and delivery of a distinctive and technically coherent project for the Merthyr Tydfil Synagogue. The professional team is presently being procured and is likely to be comprised of the following:

- FJH represented by the Client Project Manager and Project Steering Committee.
- Multi-disciplinary design team inclusive on Conservation Architect (Lead Consultant), Principal Designer, Structural and Civil Engineer, services (Mechanical, Electrical and Plumbing) Engineer, and other services necessary to satisfy planning and other statutory agencies.
- QS and project strategy – appointed as a result of this tender process.
- Business, activity and funding support procured and provided directly by the Client.

There has been preliminary cost advice as the Client has prepared the NLHF Round One application, and for the preparatory work as part of RIBA Stage 1 – and this has provided confidence in the overall Project and its cost in relation to outcomes and funding targets. As the Project progresses through the Development Phase, the overarching responsibility of the Quantity Surveyor is to liaise with the Client and the professional team to provide advice on costs as required.

Across the Development Phase (RIBA Stages 2-3) of the Project, key tasks include:

- Confirm the work to date through RIBA Stage 1 including the Initial Project Brief and the NLHF Round 1 submission, and the cost estimates provided for the project.
- Provide cost estimates of the emerging design, leading to a Stage 2 and Stage 3 Cost Estimate Report.
- Prepare a Detailed Cost Breakdown for the project, with appropriate allowances for all construction, construction-related, fee, contingency and inflation allowances.
- Assist Architect / Lead Consultant in developing the project goals.
- Provide Client with advice on suitable procurement options/strategy for the Delivery Phase.
- Work with the Client to produce a Cashflow for the project.
- Work with the Client to produce a calculation of full cost recovery for the development phase.
- Provide costings for the 10-year Costed Management and Maintenance Plan for the Building and Site.
- Liaise with Project Manager, Conservation Architect, Business Planner and the other Design Consultants throughout the process.
- Prepare and maintain a design/construction risk register and organise/record client/team risk workshops at appropriate points.
- Produce an interim cost report for submission in relation to funder requirements.
- Prepare and present such other information as might be required to complete the NLHF and other funding applications and to respond to assessor's queries.
- Obtain Client approval to proceed to RIBA Stage 4 Technical Design subject to the approval of all funding and the confirmation of the client that the project and appointment are to proceed.

The Quantity Surveyor will be expected to work alongside the FJH and professional team, including:

- Attending and contributing to regular project and design team meetings across the development phase. Some meetings may be on site, whilst others may be remote.
- Contributing information and advice to the rest of the project team on risk and value management and cost control.
- Meeting, if required, with and discussion with FJH partners and advisors in respect of costing of exhibition and commercial fitout.
- Attendance at the mid-term review meeting with NLHF.

This commission extends to the provision of cost consultancy services across both the NLFH Development Phase and the subsequent Delivery Phase (RIBA Stages 4-7), at the discretion of the Client. the Delivery Phase of the Project. There will be a break clause ahead of the Delivery Phase, pending determination of the NLHF Round 2 application and securing of funds for delivery.

The Scope of Work for the Quantity Surveyor for the Delivery Phase will continue to be based on the tasks above, and tailored to cost advice across RIBA Stages 4-7 at a comparable service level.

### **TIMETABLE**

The procurement timetable will be:

- Tender advertised: 08/03/2023
- Tender submissions by: 12pm (noon) Monday 10/04/2023
- Interviews with shortlisted candidates: Week Commencing 17/04/2023
- Appointment made: Week Commencing 24/04/2023
- Commencement: Week Commencing 01/05/2023

Note there is a degree of flexibility regarding commencement and startup, but a rapid mobilisation is anticipated given NLHF Delivery Phase timeframes.

The Foundation for Jewish Heritage will inform applicants of the outcome of the process via email. All correspondence will be handled by the Foundation Chief Executive and the Project Manager.

It is anticipated that the development phase will be for a period of 14-16 months from commencement. Time allocation may change month by month as project demands fluctuate, therefore a flexible working approach will be required.

### **TENDER SUBMISSION DETAILS**

This tender is being managed through Sell2Wales. All enquiries, questions and clarifications should be submitted through the Sell2Wales portal. Tender submissions should be made through the Sell2Wales portal, or emailed directly to the Client at [enquiries@jewishheritage.wales](mailto:enquiries@jewishheritage.wales) (emails to specify 'Cost Consultant Tender' in the subject line).

Tender submissions should address the criteria for appointment as set out below. As part of any submission, tenderers should also confirm that they are not bankrupt, the subject of an administration order, are not being wound up, are not the subject of a petition presented for the sequestration of their estate, have not had a receiver, manager, or administrator appointed and are not otherwise apparently insolvent. They should also declare that no person engaged will have been convicted of conspiracy, corruption, bribery, or money laundering, that they have not been convicted of a criminal offence, committed an act of grave misconduct, related to the conduct of their business or profession, and that they have fulfilled obligations relating to the payment of taxes.

Tenderers are solely responsible for the costs and expenses incurred in connection with the preparation and submission of their Tender and all other stages of the selection and evaluation process.

FJH reserves the right to make an appointment in accordance with its assessment of the tenders received, to make no appointment and/or to seek clarification from tenderers as part of the process. FJH may offer a site visit and clarification meeting during the tender period and/or seek clarifications of tenders following submission. Requests for a site visit should be made to the Chief Executive of FJH and the Client Project Manager at the aforementioned website.

### **ASSESSMENT AND EVALUATION CRITERIA**

The contract shall be awarded to the most economically advantageous tenderer on the basis of 60% quality and 40% price.

## Quality Assessment

The bids will be assessed against the criteria below. Items 1, 2 and 3 will be scored as equally weighted criteria and will account for 60% of the overall evaluation. Items 4 and 5 will be marked as pass/fail and any submission not presenting the required information will be failed:

1. Understanding of FJH brief.
2. Proposed methodology.
3. Demonstration of knowledge, experience and expertise within this field; specifically in relation to heritage projects in respect of listed buildings, and NLHF project experience.
4. Demonstration of formal accreditation, with reference to projects of comprehensive track record in the successful completion of heritage building projects.
5. Statement of confirmation of capacity and ability to deliver the required outcome within the time available.

You are required to supply the information listed below to enable evaluation of the bid:

- a) A response of not more than 800 words to each of items 1, 2 and 3 above, referencing previous experience where appropriate.
- b) Details of public, employers and professional indemnity insurance. Certificates are not required at this stage but may be requested prior to contract.
- c) Details of two referees for work of a similar nature. These will not be scored, but may, by agreement with yourselves later, be used for verification purposes prior to contract if required.

## Price Assessment

Tenderers are required to submit prices across the both the Development and Delivery Phases as detailed in the Scope of Work, as follows:

### **1. Development Phase**

For the Development Phase, tenderers are required to submit a lump sum fee proposal, together with a breakdown of the day rates of any personnel who will be involved in the project and the number of days allocated to each person. The fee should be split in relation to the RIBA work stages. All costs shall be fully inclusive of all staff, sub-contractor costs and attendance at minimum monthly meetings with the project team and should include expenses and disbursements. Prices should be exclusive of VAT.

Tenderers should note that a budget for the work has been established which is £15,537 for the Development Phase, excluding VAT.

### **2. Delivery Phase**

Tenderers are required to provide an indicative fee proposal based on a percentage of total capital construction costs for the project, which are estimated at £1,421,497 excluding VAT. The fee should be split in relation to the RIBA work stages. A budget for the work has been established which is £36,253 for the Delivery Phase, excluding VAT.

The price assessment will be based on prices for both the Development and Delivery Phases. Prices submitted will be assessed on the basis that the lowest price submitted will receive full marks, with other price scoring marks adjusted in relation to the amount by which the submitted tender is in excess of the lowest tender.

Phased payments will be at agreed stages of the contract.

**WELSH JEWISH HERITAGE CENTRE**

**FOUNDATION FOR JEWISH HERITAGE**