



Introduction

Selecting contractors to undertake the works for your war memorial project is one of the most important parts of the project. If the tender process is undertaken in the right way then it can help to avoid problems and ensure you get the best contractor. For most memorial projects the tender process is simple and has just a few stages. We recommend that the focus is on getting it right rather than getting it done quickly as undertaking inappropriate works as a quick fix can cause long-term damage. The following guidance is aimed at smaller projects; large and complex projects will probably have to follow a more formal tender process (see details on procurement legislation at the end of this helpsheet).

Identifying works

The first stage in the tendering process is to identify the works required. In some cases this may be simple as the works required may be obvious and basic; in other cases the situation may not be so clear or a more extensive and complex project may be required. If you can supply good quality photographs the Trust's Conservation Team are happy to help advise on the works required if you need help with this.

- Where you can identify the works yourself you should draw up a basic **schedule of works** which you will use later to tender for the work. Once you contact contractors they may suggest some alternative works required and will also provide details of how they will undertake the works.
- You do not need to produce a detailed specification; you only need to give enough information to allow all contractors to quote **fairly and competitively**. For example, if you just contact contractors and say you want the war memorial 'tidied up' then you could end up with wildly different works and prices quoted which is unfair for the contractors and makes it difficult for you to identify the best value for money. Instead, you could, for example, ask for re-pointing in lime mortar, cleaning and repairs to damaged stone with indents and mortar repairs.

- In cases where the project is extensive, complicated, the memorial is in a particularly poor condition or is listed then you may need to consider **commissioning a professional adviser**, such as an architect, to investigate this and write a schedule of works or to commission a condition survey and specification from a conservator. If you are unsure if you need a professional adviser to write the specification of works for you, contact the Trust's Conservation Team who can discuss this with you.

Identifying contractors

The choice of contractors is a key part of a project. Please see our guidance on 'Types of contractors and their roles' to help select the type of contractor most appropriate for your project.

Obtaining quotes and tendering

Once you have an idea of the works required and the type of contractor(s) you will need, it is time to go out to tender. For most projects this will be a simple process.

- You should identify a number of contractors to send your schedule of works to.
- If you are applying to the Trust for a grant you will need 2-3 quotes depending on the scheme. Please see the Trust's helpsheet on 'Conservation contractors' to help identify contractors.
- Even if you are not applying for funding you should try to obtain as many quotes as possible as this is helpful for two reasons: firstly, it allows you to compare **prices**; secondly, it allows you to compare the **types of works and methods** they are proposing.
- Only when you see the proposals from a number of contractors can you see the difference in the works they are proposing. You run the risk that if you only seek one quote that the only option you have is an inappropriate one. Often it comes down to the skills of an individual or company to determine the works

they suggest; if they do not hold the necessary skills they will not provide you with that option which it may be possible to seek elsewhere.

- The Conservation Team is happy to provide comments on quotes received, even if you are not applying for funding.

Information to include in tender documents

Please see War Memorials Trust's 'Example tender document' for use as a guideline alongside considering the points below.

- If it is a historic or listed memorial or designed by a noted architect or sculptor.

When tendering you should make it clear that the project involves a historic structure / object and that the works need to take an appropriate **conservation** approach. If the memorial is listed or has any statutory designations then you should also highlight this as it may inform the works and will avoid proposals being made which will not be approved when you apply for permissions. If the work is by a noted architect, sculptor or craftsman then it is important to highlight this fact as it will probably influence what works can and should be done.

- Comprehensive photographs of the memorial and the areas in need of attention.

Ideally those tendering should see the memorial in person before submitting their quote as they will have a better idea of its condition and the work required, however, this may not be essential on smaller more basic projects. In these cases you should send photographs showing the memorial and close-ups of the areas which require work. Please bear in mind that people will travel to undertake work so do not assume you only need to look locally.

- When you need the works completed or any times which are more, or less, convenient.

Depending on the nature of the project it may be limited to certain times of the year. For example, lime mortar is more likely to fail if used in very hot or cold weather. Furthermore, depending on the location of the memorial there may be other factors which influence when the works can take place, such as school holidays and church services.

It is important to remember that many people will

try to have memorial projects completed in time for Remembrance Sunday and major anniversaries so contractors will be in demand. This combined with the fact that most projects are undertaken in the spring-autumn because of the weather means you should try and commission your contractor as early as possible to ensure there is time to complete your project. Alternatively, think about whether you are flexible about dates – rededication services can take place on other dates or do not need to be held immediately.

- The level of detail required in the contractor's quote.

If you are applying for funding you should make this clear as additional information will probably be required in the quote than they may usually provide. All the proposed methods and materials should be detailed to enable funders to assess whether they are eligible for support.

If you have a detailed specification which is an itemised list of materials and methods to be used then the contractors will just price against the items, which allows for direct comparison. If your brief is more vague such as 'cleaning' it is important that you request the contractors to detail what method of cleaning they will use and the specific materials, where appropriate. This allows for comparison of price and methods and ensures you know exactly what will happen to the memorial.

If the specific works are not detailed from the beginning it will be difficult to query any works once they are finished. For grant applications it is essential that all methods and materials are detailed.

- How and when you will make your decision.

You should detail the basis upon which you will be making the decision. Normally the decision will initially be based on the suitability of the method statement and technical approach proposed by the contractor, then a comparison of costs will be made. You should ensure this criteria is clear to all your prospective tenderers. It is a good idea to ask for examples of previous similar work they have undertaken and references.

- You should set a deadline by which you require responses and who these should be sent to.
- If you have hired an architect to manage the project they may undertake the tendering process for you.

Procurement legislation

It is important to note that procurement for war memorial projects (both for works and professional advisers) may be subject to both **UK and EU procurement legislation** if some of the funding is coming from **public funds**. In addition, individual organisations may have their own procurement rules and grant funders may also have requirements on how you tender for and select contractors for a project. War Memorials Trust has guidance on 'Procurement legislation and war memorial projects' available on its website (www.warmemorials.org/a-z).

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. War Memorials Trust is not responsible for the content of external sources.

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