



Thanks to National Lottery players

Leas Lift: Restoring Folkestone's gem for the community

ITT Interpretation & Activity Planning



Issue Date: 30th March 2022

Response Date: 26th April 2022

Background

Leas Lift is a Grade II* (Historic England No. 1061185) cliff funicular railway situated in the Leas & Bayle Conservation Area in Folkestone. The Lift's listing covers: the waiting rooms which were designed by Reginald Pope in a Domestic Revival style and built by John Newman, a local builder; pump room, which was added in 1890 in a similar style with a second lift (removed in 1985); lower station tanks, track, cars, wheel houses; and tank room, upper station tunnel and railings. The listing specifically highlights four areas of significance: rarity of a lift of this type - one of only three remaining water-balanced lifts in the UK; engineering and structural interest; rarity and degree of survival of the working machinery; and architectural interest of the waiting rooms and pump house. Historic England have confirmed it is of National Significance,

“for its historical value primarily due to its engineering and its rarity. It is one of only eight water balance cliff lifts in the country, of which only three operate using their original system. It retains its original engineering system, including its 1890 reciprocating pumps and the only working band brake in a funicular railway worldwide” (Isabelle Ryan, Assistant Inspector, April 2021)

Leas Lift opened on 21st September 1885, connecting The Leas with the seafront, and has carried 36 million visitors. Access remains via The Leas and Lower Sandgate Road through the Upper and Lower lift stations. Each carriage can carry 14 people. In its early years, the Lift enjoyed a great success because it satisfied a need and, being new, had comparatively low maintenance costs. By 1887, a couple of design flaws had been discovered which resulted with the fitting of a new braking system and the replacement of the vertical wooden struts under the sleepers with concrete. Apart from that, the Lift appears to have done so well as to require the addition of a second lift in 1890, at which time a water recycling system was also installed.

The District Council ran the lift until 2009, and then a CIC. In 2017 the Lift closed when the Victorian braking system, which is manually operated, with no adequate failsafe, was deemed to be inadequate by the Health & Safety Executive (HSE). The Lift has been closed since. A new Leas Lift CIC was incorporated in 2018 with new Directors. It is now a charity. They have worked hard to keep the buildings in good repair, spent two years building a robust governance model, raising funds, consulting with over 2,500 members of the public and commissioning professionals to understand what is required to restore, re-open and operate the Lift once again for the people of Folkestone and wider community. This has included:

- Putting the Lift on Historic England's At Risk Register in 2019.
- Commissioning mechanical and electrical condition surveys in 2018 and 2020.
- Commissioning an Access statement in 2019.
- Securing a Project Viability Grant from the Architectural Fund in 2020/21 which explored how the lift could be accessible, potential visitor routes, interpretation and visitor facilities.

- Developing a Business Plan and capital fundraising strategy, including the formation of an Appeal Board, funded by a grant from Folkestone & Hythe District Council.
- An agreement with the Trustees of Folkestone Estate to take over the freehold.
- Securing £750K of Section 106 funding.
- Securing a £0.4 million Round 1 grant from the National Lottery Heritage Fund
- Testing demand for a café. A pop-up run by a local business opened in the bottom lift in September 2020. This is helping support the CIO whilst the Round 2 application is being developed.
- The CIC submitted an application to the Charities Commission in May 2021 and is now a CIO. This is to support the future fundraising appeal.

Aims of the project

The project's aims are to:

- restore the lift cars, waiting rooms, pump room, tanks, track, wheel houses and upper station tunnel and railways and re-open the lift to the public by meeting the requirements of the HSE and Mining Inspectorate;
- deliver a programme of heritage engagement activities through outreach and on-site visits and activities, breaking down economic, physical and attitudinal barriers;
- undertake oral history and 'memories' project which will inform permanent interpretative displays telling the stories of the Lift – why it was built, the wider Victorian context, celebrating the engineering behind it, its significance within Folkestone as an iconic heritage site, both in the town's heyday and today and the community's memories.
- improve access to the Upper and Lower lift stations so that all members of the community can access all areas;
- provide an excellent visitor experience with 21st century facilities;
- create 16 FTE jobs, support a Heritage Engineering apprentice and work; experience and placement opportunities for young people at school, college and university to enhance their employability;
- minimise the carbon footprint; and
- ensure Leas Lift is resilient by developing a highly trained workforce, volunteer corps and sustainable business model.

The local economy will benefit from jobs during the construction period. Once operational the Lift will create 10 FTE jobs, support an apprenticeship, and seasonal jobs. The café will create at least 6 FTE jobs.

Audiences

The Business Plan projects 95,000 paying trips will be made on Leas Lift and 110,000 in a Triennial year. This audience will be made up of:

- Residents of Folkestone and Hythe District Council
- Adult Special interest and leisure groups within a 60 minute catchment

- Day-trippers to Folkestone from within a 90 minute catchment
- Domestic tourists staying in serviced and non-serviced accommodation in Folkestone and with Visiting Friends and Relatives

We intend to engage with the following priority audiences through the Activity Plan:

- Residents who require communication assistance e.g. people who are deaf, have hearing loss, are deafened, blind or partially sighted, with autism, dementia and mobility difficulties.
- Residents who are socially isolated
- People living in care homes/ supported housing
- Primary Schools within Folkestone and Hythe District Council with a higher than average eligibility for free school meals (eFSM)
- Uniform groups in Folkestone and Hythe District Council seeking trips to support their badges
- Young people (18 to 24 years) studying in Folkestone and at local colleges and Universities in the south-east, particularly at schools with a higher than average eFSM

Consideration is being given to digital outputs as a means to share during Covid or similar and help to attract socially isolated.

Consultation with over 2,500 people during summer 2020 tested interest in five interpretation themes spanning: the history of the Lift; the engineering; people connected to it; as an energy efficient mode of transport; and the restoration of the Lift. Unprompted comments revealed a specific interest in the Victorian 'hey day' of Folkestone, individuals' shared strong and evocative memories of going on the Lift and their pride in the Lift. A number of activities were also tested. A draft Activity plan has been developed which informed the Activity Planning budgets.

Discussions have been had with two potential training providers for the Heritage Engineering apprenticeship. The preference is to work with the Heritage Skills Academy who operate out of Bicester and Brooklands – <https://www.heritageskillsacademy.co.uk/> Their programme is over 3.5 years. As the Lift will not be operational until 2025, the Activity Planner will be expected to work with the Board to identify, and get agreement with other heritage sites, or similar to provide hands-on experience during 2024.

The draft Activity Plan is provided as an appendix to this brief, together with a brief for Kent Coastal Volunteering (KCV) who are going to work with a named artist to reach isolated people and attract the Nepalese Community to join in. This project will run from June to December 2022. KCV Ambassadors will promote the project to the people they support through befriending and driving services. The artist will run workshops to elicit memories from participants. This will be used as a way of hearing the memories of, and consulting with people who are unlikely to be reached through traditional consultation.

Their work will be celebrated through an exhibition – the purpose of this is to build a community, which can be engaged during the delivery phase. Some of the work might also be incorporated into the Interpretation Scheme. The Interpretation and Activity Planner will therefore be expected to work closely with them – not delivering the project, but ensuring it fits with the other strands of consultation and in building future projects during delivery to continue to engage these audiences.

The current business plan, and full consultation findings will be provided to the consultant on appointment.

Timetable

The Development Phase (RIBA 1 to 3) is planned to end in May 2023, when a Round 2 application will be submitted to the National Lottery Heritage Fund. This is to allow time to raise the partnership funding for the project and undertake necessary investigations.

Other Appointments will be procured separately:

- Architect/Lead Design Consultant
- Heritage Consultant (Conservation Management Plan)
- Technical Project Manager
- Quantity Surveyor
- Structural/Civil Engineer
- MEP Services Engineer
- Principal Designer
- Fundraising Consultant
- Business Planner
- Evaluation Consultant
- Interpretation/Graphic Designers

Timeline

The contract will run until the end of May 2023. Key dates are:

- Draft Conservation Management Plan – mid June 2022
- Appointment of Interpretation / Graphic Designers by July 2022
- Project with KCV – June to December, exhibition early 2023
- Mid Stage Review – around January 2023
- Submission of Round 2 – May 2023

The capital work will be undertaken during 2024, handover is planned for the end of February 2025, an official opening is planned for 10th April 2025. The three-year Activity Plan will be delivered from January 2024 to December 2026, initially through outreach, and then on-site. The completion report and summative evaluation will be undertaken during the first quarter of 2027.

This role reports to the Activities & Community Engagement Committee; Cathy Beare, James Walker-Osborn and Jo Atkinson.

Brief for an Interpretation & Activity Planner to deliver an Activity Plan

This brief is for an Interpretation and Activity Planner for the Leas Lift project during the development phase only.

We are seeking to appoint an Interpretation & Activity Planner or small consultancy who can demonstrate the following:

- at least 5 year's experience of developing and delivering interpretation and activity plans for heritage sites which were successful at Round 2 (first time)
- experience of developing activity plans of a similar size / scale (£250K+)
- ability to be flexible and work collaboratively with an active Board of Trustees, rest of the consultant team and volunteers
- experience of Folkestone and the local area
- knowledge and experience of the National Lottery Heritage Fund 2021/22 priorities and processes
- willingness to actively consult with the target audiences, both digitally and in Folkestone.

The scope of works required includes:

INTERPRETATION

- recruiting and supervising a group of research volunteers who will undertake research to inform the interpretation plan including stories of The Leas
- working with Kent Coastal Volunteering and an artist to maximise the benefits of the 'Memories' project – building a community for the future
- developing the work undertaken in the current business plan to define the potential audiences for heritage engagement and interpretation
- the development and delivery of an interpretation plan. This should be informed by the conservation management plan¹, consultation and research project and include:
 - key themes, sub-themes and storylines and potential resources to illustrate these
 - learning, behavioural and emotional outcomes of the interpretation
 - summary findings from consultation with the target audiences
- reviewing a brief for the interpretation /graphic designers who will translate the plan into an interpretative scheme and attending an interview to appoint them
- formatively testing the interpretative approach and interpretation themes with key stakeholders

¹ Terry Begent has also written a book called The lift, The history, heritage and hardware of Folkestone's Victorian water lift.

ACTIVITY PLANNING

- Consultation with key stakeholders, partners and training providers on the draft activity plan
- The development of a 3 year Activity Plan which meets the requirements of the National Lottery Heritage Fund and the following appendices (these may expand during the development phase):
 - A summary of the consultation findings
 - Briefs for any commissions during the Delivery Phase
 - Role descriptions for the Community Engagement Coordinator and Marketing & Events Coordinator (drafts included in the RI)
 - Review of the graduate /sandwich placement (draft included in the RI)
 - A detailed, and costed plan for the delivery of the Heritage Engineering Apprenticeship including agreements for work experience before the Lift opens
 - Volunteer handbook to include volunteer role descriptions, induction and other relevant policies
- work with the Evaluation Consultant to ensure baseline data has been collected and a robust evaluation framework has been developed which is appropriate for evaluating interpretation and heritage engagement plans, including volunteering
- liaise with the Business Planner to ensure the Business Plan and Activity Plan are synchronised
- attending the mid-stage review
- Prepare the Round 2 Application form, seeking relevant information from the professional team.
- Attending the Mid Stage Review meeting

A detailed VAT report is in draft that provides guidance relating to use of the Lift building where we may host activities and expect to install interpretation. This report helps to steer us in relation to the VAT impact of certain activities which will need due consideration when creating plans.

General duties include:

- Providing monthly progress reports
- Attending monthly project team meetings
- Providing relevant information to support fundraising applications
- Supporting the project manager and trustees by sitting on the interview panel for the Interpretation designer
- Contributing to the risk register
- Participating in the evaluation of the development phase

Copyright

Folkestone Leas Lift CIO will own the copyright of the plan and it should be made publicly available.

Deadline

Completed tenders should be returned by 5 pm on 26th April 2022 to cathybeare@jcmo.uk (please note the e mail ends .uk and not .co.uk). No questions will be accepted after 5 pm 13th April 2022. It is the Tenderer's responsibility to ensure that they are received on time. Clarification interviews will be held on Thursday 19th or Friday 20th May 2022 via zoom.

Fee

The fee for the Interpretation & Activity Planning Consultant is £20,000 plus VAT during the development phase. This tender is not being scored on price but value, what the Consultant will provide within the budget.

There is a budget of £5K to support consultation with the community e.g. if communication assistants such as a BSL signer were required to enable consultation, expenses for people to attend groups etc. Please do not include this in your price. It will be managed separately.

Tender submissions – please read carefully

The purpose of the tender response is to enable the Trustees to evaluate your understanding of our requirements, the suitability of your proposed approach and experience and skills of your team. Your response should consist of the following:

- A written response to the evaluation criteria below.
 - a. Ensure your responses relate to the project brief. Do not include generic information. Any general marketing material about your company or additional appendices that have not been requested will not be considered.
 - b. If you are tendering for more than one Lot ensure each response is in a separate document.
- A priced offer in the format request.
 - a. It is the Tenderer's responsibility to ensure all fees, rates and prices quoted are correct. Tenderers will be required to hold these or withdraw their tender in the event of errors being identified after the submission of tenders.
 - b. If a Tenderer fails to provide fully for the requirements of the specification in the tender it must either absorb the costs of meeting the full requirements of the specification within its tendered price, or withdraw the tender.
 - c. No tender will be considered which is late, for whatever reason nor will changes be permitted after the closing date.
 - d. All tenderers shall keep their respective Forms of Tender valid and open for acceptance by the Trustees for 90 days from receipt.
- Signatures of appropriately authorised individuals e.g. where the tender is a Limited Company, by a Director; where it is a Partnership, by two authorised partners or by an individual if they are a sole trader. Signatures can be scanned.
- Evidence of appropriate insurances. All consultants should have Public and Professional Liability and Companies Employer's Liability if they have employees.

Evaluation criteria

Tenders will be evaluated according to the following criteria:

- Understanding of the project (10%)
- Approach to interpretative planning (20%)
- Approach to activity planning (20%)
- Approach to consultation (20%)
- Relevant experience (20%)
- value for money (10%).

The Trustees will assess Tenderers' responses according to these criteria and will award points up to the maximum shown against each heading in the Quality evaluation assessment table below. Failure to achieve a rating of satisfactory (i.e. a minimum unweighted score of 3 or above) in any one or more categories may result in the bid being disqualified at the Trustees discretion.

Assessment Criteria	Score
Unacceptable: either no answer is provided, or the answer fails to demonstrate that any of the CIO's key requirements in the area being measured will be delivered.	0
Poor: fails to demonstrate how the CIO's basic requirements in the area being measured will be addressed, giving rise to serious concerns that acceptable outcomes would not be delivered against the project brief.	1
Weak: barely demonstrates how the CIO's basic requirements in the area being measured will be addressed, giving rise to concerns whether acceptable outcomes would be delivered against the project brief.	2
Satisfactory: demonstrates how the CIO's basic requirements in the area being measured will be addressed so as to deliver acceptable outcomes against the project brief.	3
Good: demonstrates how most of the CIO's requirements in the area being measured will be addressed so as to deliver good outcomes against the project brief.	4
Excellent: demonstrates clearly how all of the CIO's requirements in the area being measured will be fully addressed so as to deliver excellent outcomes against the project brief.	5

Please note the following:

Preparation of Tender

Tenderers are responsible for obtaining all information necessary for the preparation of their response; and all costs, expenses and liabilities incurred in connection with the preparation and submission of the Tender and attending any interviews will be borne by the Tenderer.

The Tenderer is expected to have carried out all research, investigations and enquiries which can reasonably be carried out and to have satisfied itself as to the nature, extent, and character of the requirements of the Contract (in the context of and as it is described in the

Specification), the extent of the materials and equipment which may be required and any other matter which may affect its Form of Tender.

Tenderers may seek clarification on any of the points contained in the tender documents at any time **prior to seven working days** before the date for receipt of tenders. This will allow time for the Trustees to prepare a response to all tenderers by four days before the tender deadline and for all tenderers to incorporate the clarification prior to the tender deadline.

Non-consideration of Form of Tender

The Directors reserve the right not to award the contract to the highest scoring, lowest priced or to any tenderer; and reserve also the right to accept any of the same in whole or in part. The Directors may also refrain from considering any Form of Tender if it is not in accordance with the Form and Conditions of Tender, or the Tenderer does not provide all of the information required or attempts to make variation or alterations to the Form of Tender, Conditions of Contract or the Specification.

Tenderer's Warranties

In submitting a Tender, the Tenderer warrants that:

- It has not done any of the acts in the Non-Consideration of Form or Tender,
- all information provided is true, complete and accurate in all respects including details of previous projects being presented as examples,
- it has full power and authority to enter into the Contract.
- it is of sound financial standing, and
- its partners, directors and employees are not aware of any circumstances that may adversely affect such financial standing in the future.

Confidentiality

The Form of Tender, the Conditions of Contract, the Specification, and all other documentation or information issued by the Directors relating to the Tender shall be treated by the Tenderer as private and confidential for use only in connection with the Tender and any resulting contract and shall not be disclosed in whole or in part to any third party without the prior written consent of the Directors.

The documents which constitute the project and all copies thereof are and shall remain the property of the Directors (whether or not the Directors shall have charged a fee for the supply of such documents) and must not be copied or reproduced in whole or in part and must be returned to the Directors upon their request.

All information provided by tenderers as part of a tender return will be treated as confidential.

Freedom of Information

Information in relation to this tender may be made available on demand in accordance with the requirements of the Freedom of Information Act 2000.

Tenderers should state if any information supplied by them is confidential or commercially sensitive or should not be disclosed in response to a request for information under the Act, and should state why they consider the information to be confidential or commercially sensitive.

This will not guarantee that the information will not be disclosed, but will be examined in the list of the exemptions provided in the Act.

APPENDIX A: Form of Tender

Please complete this form and include it with your responses to the questions above.

Project: Leas Lift: Restoring Folkestone's gem for the community

Professional Service: Interpretation & Activity Planning

Name of Tenderer:

I/We, the undersigned, do hereby offer to execute and complete the above mentioned professional services in strict accordance with the Schedule of Services for the following lump sum fee:

£ ____ plus VAT (delete if VAT not applicable) for the development phase (RIBA Stage 1 to 3)

Confirm figure in words: _____ plus VAT (delete VAT if not applicable)

1. Resources

Please state the number of days intended for the development Phase:

2. Day Rates

Team	Day Rate (£)
Director/ Partner	
Senior Consultant	
Consultant	
Other – specify _____	

The above day rates will be utilised to negotiate any additional works that may be required if deemed to be beyond the reasonable scope of the works specified. All day rates are to be based on a 7.5 hour day and are to include allowance for disbursements.

3. Expenses and Disbursements

The fee offer is to include all expenses and disbursements (including printing charges).

4. Offer Period

This tender/ offer is to remain open for a period of 90 days from the date fixed to the return of tenders.

Dated this _____ day of _____ 20__

	Tenderer to provide responses. Some are pass/ fail
Name of firm or company	
Postal address	
Registered address (if applicable)	
Company number (if applicable)	
Please indicate if you are: a sole trader, partnership, Public or Private Limited Company or other type of organisation	
Main contact	
Contact telephone number	
Contact email address	
Please indicate your level of Employer's Liability Insurance, the policy number and expiry date ²	
Please indicate your level of Public Indemnity Insurance, the policy number and expiry date	
Please indicate your level of Professional Indemnity Insurance, the policy number and expiry date	
Signature of authorised person	
Name of authorised person	
Capacity in which signed	

² If you do not have any of these insurances, please indicate if you will purchase them if awarded the contract. If they are not applicable e.g. you are not an employer, please indicate this.