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## Request for Quote – 202 Project Management Services for the Bridge Street Housing Project

**Request for Quote Closing date:** Monday 29 October at 8.00am

**All quotes to be submitted via email to:** [records@donnybrook.wa.gov.au](mailto:records@donnybrook.wa.gov.au)

### BACKGROUND AND SUMMARY

The Shire of Donnybrook Balingup (the Shire) and Alliance Housing (Alliance) propose to build 11 independent living units for tenants over the age of 65 on Shire-owned land in Donnybrook.

The total cost of the project is \$3.375 million, with \$2 million awarded from the State Government, \$875,000 committed by Alliance Housing and \$500,000 committed by the Shire of Donnybrook Balingup; \$250,000 of which represents the value of the land.

The central tenet of this development is the incorporation of universal design principles into the design, construction and operation of these 9 two-bedroom and 2 one-bedroom units that will be built within walking distance of the Donnybrook central business district, IGA supermarket, river and parkland. Future proofing includes an option to add two more units as part of a future Stage 2, and a further two units as part of Stage 3, bringing the total potential units constructed to 15.

The project will be delivered by the Shire and Alliance working in partnership, with funding support from the State Government. The Shire will provide the land and the cost of site remediation and act as lead agency during the construction phase. Alliance Housing, an experienced Community Housing provider in the South West Region and a registered Regional Growth provider with the Housing Authority, will manage the ongoing tenancies and maintenance services. Tenancies will be allocated from the Housing Authority's waitlist and/or locally held waitlists from the Shire. Tenancies will be non-fixed term, and the maximum rate of rent will be no more than 25% of an individual's total income earned, either through employment or benefits, and/or compliant with the Department of Communities (Housing) eligibility criteria. The partnership between State, local government and the not for profit sector is critical to guarantee that resources, assets and expertise are available to deliver a viable and sustainable project.

The Shire is responsible for providing planning approval and the Principal Town Planner has confirmed that the proposal will comply with the relevant planning framework. Recent approvals in the immediate locality as well as informal advice from the Department of Indigenous Affairs indicate that there will be no issues with Aboriginal Heritage. The same applies to Water Corporation approval. It is anticipated that this process will be completed within the second half of 2018, after which site work can commence.

This project delivers outcomes for the State Government's regional priorities of *Investing in Jobs, Investing in Communities* and ensuring local content. This project will demonstrate a

reinvestment back into the local community through purchasing of local goods and services and providing an opportunity to engage local building companies and tradespeople to construct the units, local tradespeople to undertake ongoing maintenance and local staff to provide the in-home services. As an example, it is anticipated that 5-6 full time equivalent jobs will be created during the construction phase (one year).

Both the proponent and its partner are cognisant of the Commonwealth's Aged Care reforms that have recently taken effect, which support consumers to receive the services they need and which lead to a more sustainable and quality aged care system. The Shire is already managing Tuia Lodge, a local residential care facility and has been recognised in both the South West Development Commission's regional South West Active Ageing Research Report (2010) and the W.H.O. mandated Age Friendly Communities' study as showing leadership in the provision of services, facilities and engagement with their older residents. Embedding wellness will be a key focus of the approach to supporting residents in this new development. This project provides older people with the choice to age in place in their own homes, with services and supports close by, whilst enabling the frailer residents to transition into higher levels of care in Tuia Lodge if necessary.

## **PROJECT MANAGER – DUTIES**

### **General Responsibilities**

- Integrate preliminary design, timeframe and budget for the project as per scope (including objectives, agreed priorities, constraints and critical assumptions);
- Develop a master project program, integrating the inter-dependencies of planning, design and construction as per the above;
- Establish procurement requirements and preferences, including potential specialists and contractors and acceptable methods of obtaining quotations, offers and tenders (aligned to Shire procurement policies and local content promotion);
- Assist with and/or manage the development, evaluation and implementation of project tenders, quotes, proposals and expressions of interest in accordance with agreed procedures;
- Implement and manage all related planning documents as per project requirements;
- Align all funding sources and associated milestone requirements with project/building schedule and all related payment schedules;
- Establish and monitor processes to manage and implement any changes to the scope of the project;
- Establish and monitor processes to communicate project progress, issues and action items;
- Where detailed estimates have been used to secure funding for the project, contact suppliers to firm-up quotes and/or confirm their ability to supply within the allocated timeframe and budget;
- Carry out risk assessment, develop a risk assessment plan and ensure that all contractors have the necessary qualifications and insurances relevant to project compliance;
- Monitor all project participants to ensure they meet quality management obligations;
- Monitor information distribution and establish project-specific record keeping;
- Collate information and provide regular (regularity to be determined) written progress reports;
- Manage the closing-out of the project, including the submission of all related and required records.

### **Attendance at Meetings**

The Project Manager is expected to coordinate and attend all project-related meetings and in accordance with any directive from the Shire. The Project Manager will also be required to attend Project Control Group (PCG) meetings, held monthly in Donnybrook, in accordance with the Financial Assistance Agreement (FAA) signed with the Department of Primary Industries and Regional Development (DPIRD).

### **Consultation**

The Project Manager is to manage project-related consultation processes, in collaboration with the Shire.

### **Consultants/Trades**

The Shire has identified that contractors will be required to deliver this project. The contractors will be managed and coordinated by the Project Manager.

Prior to engagement of any of the above services the Project Manager is to seek the Shire's approval and the Shire will issue a purchase order directly to the contractor after cost estimates are sought.

### **Procurement**

The Project Manager when required to undertake any purchasing activity (including the tender process if required) as the Shire's agent shall ensure the following are adhered to:

- a) Local Government (Functions and General) Regulations 1996; and
- b) The Shire's policies and procedures.

### **Project Scope**

<b>Deliverable</b>	<b>Performance Measure</b>	<b>Performance Method</b>	<b>Milestone</b>
Funding Agreement Executed	Execution of funding agreement	Funding agreement signed by both parties	August 2018
Monitoring and Evaluation Plan	Monitoring and Evaluation Plan completed and implemented	Monitoring and Evaluation plan developed and implemented	January 2019
Site Remediation Completed	Site remediation completed	Evidence to the satisfaction of the Department that site remedial on has been completed	June 2019
Means Testing / Allocation Model	Means testing / allocation model developed	Means testing / allocation model endorsed by the Department	June 2019
Engagement of Environmental Design Consultant	Engagement of an appropriate third party to review design and	Evidence to the satisfaction of the Department that design and	June 2019

	construction plans to optimise ageing in place outcomes	construction plans have been reviewed by an appropriate third party	
Construction tender awarded	Tender awarded for the construction of 11 ILUs	Evidence to the satisfaction of the Department that a contract is awarded for construction of ILUs.	June 2019
Construction 50% complete	Construction is 50% complete	Evidence to the satisfaction of the Department that construction is 50% complete	June 2020
Practical completion	Construction of nine two-bedroom and two one bedroom ILU's in Donnybrook	Certificate of Practical completion provided to Department	December 2020
<b>Completion of project including all obligations</b>			<b>March 2021</b>

**PROJECT BUDGET (INCLUSIVE OF PROJECT MANAGEMENT FEES)**

\$3,375,000.

**SHIRE'S REPRESENTATIVE**

The Chief Executive Officer, or delegated officer.

**ENGAGEMENT OF PROJECT MANAGER**

The Shire and the successful Project Manager will enter into contract as per *AS 4122-2000 – General Conditions of Contract for engagement of Consultants*. All the provisions of the Contractual terms will be detailed in this Contract.

**SELECTION CRITERIA**

The Contract may be awarded to a Respondent who best demonstrates the ability to provide quality products and or services at a competitive price. The quoted prices will be assessed together with the compliance and qualitative criteria to determine the most advantageous outcome for the project.

The Shire has adopted the best value for money approach to this RfQ. This means that, although price is considered, the Response containing the lowest price will not necessarily be accepted, nor will the offer ranked the highest on the Qualitative Criteria.

The Shire uses a scoring system as part of the assessment of the Qualitative Criteria. Unless otherwise stated, a Response which provides all the information requested will be assessed as satisfactory.

The extent to which the Respondent demonstrates greater satisfaction of each of these criteria will result in a greater score. The aggregate score of each Response will be used as one of the

factors in the final assessment of the Qualitative Criteria and in the overall assessment of value for money.

Compliance Criteria

The compliance criteria is detailed in the Respondents Offer (at the end of this document) and will not be point scored. Each response will be assessed on a Yes/No basis as to whether the criterion is satisfactorily met. An assessment of “No” against any criterion may eliminate the Submission from consideration.

Selection Criteria

In determining the most advantageous Response, the Evaluation Panel will score each Response against the Qualitative Criteria as detailed below. Each criterion will be weighted to indicate the relative degree of importance that the Client places on the technical aspects of the goods or services being purchased.

Note: It is essential that Respondents address each Selection Criterion.

<b>Selection Criteria</b>		<b>Weighting</b>
<b>1.</b>	<p><b>Related Project Management Experience</b> Provide in an attachment labelled “Related Project Management Experience”</p> <p>a) List two recent projects where the Respondent has provided similar services, including; managing project programming, design, development and documentation; contract management, and; project communication.</p> <p>b) Provide examples showing how the Project Manager found solutions to the problems that required rectification and ensured that the project was delivered in a quality focussed, timely and cost effective manner.</p>	<b>35%</b>
<b>2.</b>	<p><b>Project Methodology</b> Provide in an attachment labelled “Project Methodology”</p> <p>a) Based on the Project Scope, provide a project timeline (Gantt Chart or similar, aligned to fixed milestones as per Project Scope) and project methodology, highlighting key hold points for all stages of the project.</p> <p>b) Provide an overview of understanding of the requirements of this project. Flag potential project risks and mitigation strategies and capacity to provide effectual and cost effective project management services during the project.</p>	<b>35%</b>
<b>3.</b>	<p><b>Resources and Local Content</b> Provide in an attachment labelled “Resources and Local Content”</p> <p>a) Detail the Respondents’ available human and physical resources as required for this contract. Include specification of roles to be performed, relevant experience and qualifications, and the suitability of all project team member/s for this project.</p> <p>b) Specify where the Respondent is based. Being based in the South-West would be advantageous as a regular local</p>	<b>30%</b>

	presence and understanding of local and regional issues will be important for optimal delivery of this project. Include detail of the Respondents' understanding of any specific issues relating to aged persons accommodation project delivery in the south-west of Western Australia.	
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If you require further information regarding this Request for Quote please contact Ben Rose – Chief Executive Officer on (08) 9780 4202 or [ben.rose@donnybrook.wa.gov.au](mailto:ben.rose@donnybrook.wa.gov.au)

**RESPONDENTS OFFER**  
**(Complete and return this part)**

**FORM OF QUOTE**

**Request for Quote 202: Project Management Services for the Bridge Street Housing Project**

**Quoter's Business Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**ABN/GST Status:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

I/We agree that I am/We are bound by, and will comply with this Request for Quote and its associated schedules and attachments contained in this Request for Quote signed and completed.

I/We agree that there will be no cost payable by the Proprietor towards the preparation or submission of this quote irrespective of its outcome.

I/we have examined, and I/we agree that this quote shall remain binding on me/us for ninety (90) calendar days from the date of the quote closing or forty-five (45) days from the Council's acceptance of the quote whichever is the later unless extended on mutual agreement between the Shire and the Respondent in writing and shall not be withdrawn during that period. The consideration is as provided under the price schedule in the prescribed format and submitted with this Quote.

In accordance with the Request for Quote supplied to me/us for the purpose of quoting I hereby offer the following Lump Sum Price to perform the requirements of this Request for Quote:

**PRICE SCHEDULE**

<b><u>Lump Sum</u></b>			
<b>Item</b>	<b>Description</b>	<b>Fee (Exc GST) \$</b>	<b>Fee (Inc. GST)</b>
<b>1</b>			
<b><u>Progress Claims</u></b>			
(The total value of progress claims must equal the project lump sum fee)			
<b>Item</b>	<b>Description</b>	<b>Fee (Exc GST) \$</b>	<b>Fee (Inc. GST)</b>
<b>1</b>			
<b>2</b>			
<b>3</b>			
<b>4</b>			
<b>5</b>			
<b><u>Disbursements</u></b>			
<b>Item</b>	<b>Description</b>	<b>Fee (Exc GST) \$</b>	<b>Fee (Inc. GST)</b>
<b>1</b>			
<b>2</b>			
<b>3</b>			
<b>4</b>			
<b><u>Schedule of Rates</u></b>			
(These rates are to be used for the purposes of variations only)			
<b>Item</b>	<b>Description</b>	<b>Fee (Exc GST) \$</b>	<b>Fee (Inc. GST)</b>
<b>1</b>			
<b>2</b>			
<b>3</b>			
<b>4</b>			
<b>5</b>			

## RESPONDENT CHECKLIST

The following checklist has been provided to complete as part of your submission. Where it is necessary to provide additional information please ensure that all documents are clearly marked with the relevant Attachment title to assist the Shire with its assessment.

### REFEREES

Attach details of 2 referees, and label it " <b>Referees</b> ". You should give examples of work provided for your referees where possible.	<b>"Referees"</b>	Tick if attached <input type="checkbox"/>
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### AGENTS

Are you acting as an agent for another party?	Yes / No	
If Yes, attach details (including name and address) of your Proprietor and label it " <b>Agents</b> ".	<b>"Agents"</b>	Tick if attached <input type="checkbox"/>

### TRUSTS

Are you acting as a trustee of a trust?	Yes / No	
If Yes, in an attachment labelled " <b>Trusts</b> ": (a) give the name of the trust and include a copy of the trust deed (and any related documents); and (b) if there is no trust deed, provide the names and addresses of beneficiaries.	<b>"Trusts"</b>	Tick if attached <input type="checkbox"/>

### SUBCONTRACTORS

Do you intend to subcontract any of the Requirements?	Yes / No	
If Yes, in an attachment labelled " <b>Subcontractors</b> " provide details of the subcontractor(s) including: (a) the name, address and the number of people employed; and (b) the Requirements that will be subcontracted.	<b>"Subcontractors"</b>	Tick if attached <input type="checkbox"/>

### CONFLICTS OF INTEREST

Will any actual or potential conflict of interest in the performance of your obligations under the Contract exist if you are awarded the Contract, or are any such conflicts of interest likely to arise during the Contract?	Yes / No	
If Yes, please supply in an attachment details of any actual or potential conflict of interest and the way in which any conflict will be dealt with and label it " <b>Conflicts of Interest</b> ".	<b>"Conflicts of Interest"</b>	Tick if attached <input type="checkbox"/>

### FINANCIAL POSITION

Are you presently able to pay all your debts in full as and when they fall due?	Yes / No	
Are you currently engaged in litigation as a result of which you may be liable for \$50,000 or more?	Yes / No	
If you are awarded the Contract, will you be able to fulfil the Requirements from your own resources or from resources readily available to you and remain able to pay all of your debts in full as and when they fall due?	Yes / No	

**INSURANCE COVERAGE**

Respondents are to supply evidence of their insurance coverage in a format as outlined below or in an attachment labelled <b>“Insurance Coverage”</b> . A copy of the Certificate of Currency is to be provided to the Proprietor within 14 days of acceptance.				<b>“Insurance Coverage”</b>	Tick if attached <input type="checkbox"/>
<i>Type</i>	<i>Insurer – Broker</i>	<i>Policy Number</i>	<i>Sum Insured (\$)</i>	<i>Expiry Date</i>	
Public Liability			\$10,000,000		
Professional Liability			\$2,000,000		
Workers Comp					

Respondent Signature \_\_\_\_\_

Respondents Name (Block Letters) \_\_\_\_\_

Position Held: \_\_\_\_\_

Date \_\_\_\_\_