



RFQ Review and Update Local Heritage Survey

The Shire of Toodyay is seeking quotations from qualified and experienced service providers for the review and update of our Local Heritage Survey (LHS), previously referred to as the Municipal Inventory & Heritage List.

The successful bidder will play a crucial role in ensuring the preservation and documentation of our local heritage sites in accordance with Heritage Council Guidelines.

The RFQ documentation is available on the Shire of Toodyay's website at this link: <https://www.toodyay.wa.gov.au/council/tendering/current-tenders.aspx>

The deadline for submissions is Friday 24 May 2024 at 3.00pm AWST.

Canvassing of Councillors will disqualify submissions.

A handwritten signature in blue ink, appearing to be 'Tabitha Bateman', is written in a cursive style.

Tabitha Bateman
Acting Chief Executive Officer



Request for Quotation

Request for Quotation: Review & Update Local Heritage Survey

Deadline: Friday 24 May 2024 at 3.00pm AWST

Address for Delivery: records@toodyay.wa.gov.au

RFQ Number: 03/2024

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1 Conditions of Responding

1.1 Contract Requirements in Brief

The requirement of the contract is to review and update Shire of Toodyay Local Heritage Survey (previously referred to as Municipal Inventory & Heritage List)

A full statement of the Goods/Services required under the proposed Contract appears in Part 2 – Specification.

1.2 Definitions

Below is a summary of some of the important defined terms used in this Request:

| | |
|---|--|
| Business day: | Means calendar day but excludes public holidays as defined by the governing law of this contract. |
| Direction | Means any agreement, approval, assessment, authorisation, decision, determination, explanation, instruction, order, permission, rejection, request or requirement given by the Shire. |
| Contractor: | Means the person or persons, corporation or corporations who's Response is accepted by the Principal, and includes the executors or administrators, successors and assignments of such person or persons, corporation or corporations. |
| Deadline: | The Deadline shown on the front cover of this Request for lodgement of your Submission. |
| Deliverables | Means those documents and things required under this Contract to be handed over to the Shire by the Consultant |
| General Conditions of Contract: | Means the General Conditions of Contract for the <i>Provision of Services nominated</i> in Part 3. |
| Offer: | Your Offer to be selected to supply the Requirements. |
| Principal: | <i>Shire of Toodyay</i> |
| Response: | Completed Offer, response to Selection Criteria and Attachments. |
| Requirement: | The Goods and/or Services requested by the Principal. |
| Request or RFQ or Request for Quotation: | This document. |

1.3 Contact Persons

Respondents should not rely on any information provided by any person other than the person listed below:

| | |
|-------------------|--|
| Name: | <i>Suellyn Lockett – Cultural Heritage Officer</i> |
| Telephone: | 08 95749393 |
| Email: | s.lockett@toodyay.wa.gov.au |

1.4 Selection Criteria

The Contract may be awarded to a sole 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 qualitative and compliance criteria to determine the most advantageous outcome to the principal.

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

A scoring system will be usual 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.

1.5 Compliance Criteria

These criteria are detailed within Part 4.2.1 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.

1.6 Qualitative Criteria

In determining the most advantageous response, the Evaluation Panel will score each response against the Qualitative Criteria as detailed within Part 4.2.2 of this document. Each criterion will be weighted to indicate the relative degree of importance that the Principal places on the technical aspects of the goods or services being purchased.

Note: It is essential that each Qualitative Criterion is addressed.

Information that you provide addressing each Qualitative Criterion will be point scored by the Evaluation Panel.

Failure to provide the specified information may result in elimination from the evaluation process or a low score.

1.7 Value Considerations

The non-weighted cost method is used where functional considerations such as capacity, quality and adaptability are seen to be crucial to the outcome of the contract. The evaluation panel will make a series of value judgements based on the capability of the Respondents to complete the Requirements and a number of factors will be considered including:

- a) the qualitative ranking of each Respondent; and
- b) the pricing submitted by each Respondent.

Once the tenders have been ranked, the Evaluation Panel will make a value judgement as to the cost affordability, qualitative ranking and risk of each Response, in order to determine the Response which is most advantageous to the Principal.

The quoted price will be considered along with related factors affecting the total cost to the Principal (e.g. the lifetime operating costs of goods or the Principal's contract management costs may also be considered in assessing the best value for money outcome).

1.7.1 Price Basis

All prices for Goods/Services offered under this Request are to be fixed for the term of the Contract. Quoted prices must include Goods and Services Tax (GST).

Unless otherwise indicated prices tendered must address scope of works and all applicable levies, duties, taxes and charges. Any charge not stated in the Response, as being additional will not be allowed as a charge for any transaction under any resultant Contract.

1.8 Lodgement of Response and Delivery Method

The Response must be lodged by the Deadline. The Deadline for this Request for Quote is **Friday, 24 May 2024 at 3.00pm AWST**.

The Response is to be submitted by electronic mail to records@toodyay.wa.gov.au

Respondents must ensure that they have provided a signed copy of their Submission; to be marked "ORIGINAL" All pages must be numbered consecutively and the Submission must include an index. Any brochures or pamphlets must be attached.

1.9 Rejection of Responses

A response will be rejected without consideration of its merits in the event that:

- a) it is not submitted before the Deadline; or
- b) it is not submitted at the place specified in the Request for Quotation; or
- c) it may be rejected if it fails to comply with any other requirements of the Request for Quote; or
- d) the Respondent does not submit an Offer form which has been completed and signed together with all the required Attachments.

No web links or hyperlinks will be considered as part of any submission.

1.10 Acceptance of Responses

Unless otherwise stated in this Request, Responses may be for all or part of the Requirements and may be accepted by the Principal either wholly or in part. The Principal is not bound to accept the lowest Response and may reject any or all Responses submitted.

1.11 Response Validity Period

All Responses will remain valid and open for acceptance for a minimum period of ninety (90) days from the Deadline.

1.12 Precedence of documents

In the event of there being any conflict or inconsistency between the Terms and Conditions herein and those in the General Conditions of Contract, the Terms and Conditions appearing in this Request will have precedence.

1.13 Alterations

The Respondent must not alter or add to the Request documents unless required by these General Conditions of Responding.

The Principal will issue an addendum to all registered Respondents where matters of significance make it necessary to amend the issued Request for Quote documents before the Deadline.

1.14 Ownership of Responses

All documents, materials, articles and information submitted by the Respondent as part of or in support of a Response shall become upon submission the absolute property of the Principal and will not be returned to the Respondent at the conclusion of the Response Process PROVIDED that the Respondent shall be entitled to retain copyright and other intellectual property rights therein, unless otherwise provided by the Contract.

1.15 Canvassing of Officers

If a Respondent, whether personally or by agent, canvasses any of the Principal's Commissioners or Councillors (as the case may be) or Officers with a view to influencing the acceptance of any Respondent, then regardless of such canvassing having any influence on the acceptance of such Submission, the Principal may at its discretion omit the Respondent from consideration.

1.16 Identity of the Respondent

The identity of the Respondent and Contractor is fundamental to the Principal. The Respondent shall be the person, persons, corporation or corporations named as the Respondent in Part 3 of this Request. Upon acceptance of the Response, the Respondent will become the Contractor.

2 Specification

Review and update Shire of Toodyay Local Heritage Survey (LHS) in alignment with WA Heritage Council Guidelines for Assessment of Local Heritage Places (2022) and Guidelines for Establishing a Heritage List (2021)

2.1 Scope of Work

- (a) Review all 153 places currently included on LHS (formerly known as Municipal Inventory) as per Heritage Council Guidelines;
- (b) Review includes site visits, review physical evidence, review management categories, photographic documentation, prepare place record form;
- (c) Prepare up to seven (7) nominations of additional places for inclusion in LHS – this includes site visits, review physical evidence, management category, documentary evidence and recommendations as per Heritage Council Guidelines;
- (d) Prepare recommendations for any proposed additions to Heritage List;
- (e) Prepare LHS document including graphics, format and presentation. Document to be suitable format for online publishing; and
- (f) Provide support to Shire of Toodyay staff with community and owners' consultation.

The deadline for the scope of work to be completed by is **30 October 2024**.

3 General Conditions of Contract

The contract will be in line with the Australian Standard General Conditions of Contract for Consultants AS 4122-2010 (Incorporating Amendment No 1).

The value of professional indemnity and public liability insurance carried must be consistent with the requirements of this standard.

3.1 Insurances

- (a) Public Liability (required) – The respondent is required to have this insurance to protect them against claims arising from personal injury or property damage caused by the actions and operations of the insured.
- (b) Workers' Compensation or Personal Accident Insurance Cover (required) – All employees in Australia must be insured by their employer for Workers' Compensation. Or in the case of a sole business owner or operator then Personal Accident Insurance Cover is required. The respondent is required to show that they have the appropriate insurance in effect.
- (c) Professional Indemnity (required) – This insurance is particularly relevant for professional people in the business of giving advice and acting on behalf of others to cover legal liability resulting from their negligence or a breach of their duty of care.

3.2 Period of Contract and Termination

- (a) The Contract is to be completed on supply of the Scope of Work.

4 Respondent's Offer

4.1 Offer Form

To: The Chief Executive Officer
Shire of Toodyay
PO Box 96
TOODYAY WA 6566

I / We (Registered Entity Name): _____

Of (registered Street address): _____

ABN: _____ A.C.N. (if any): _____

Telephone: _____ Fax: _____

E-Mail: _____

In response to the Request for Quotation (RFQ) 03/2024 Review & Update Local Heritage Survey:

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

The responded price is valid up to ninety (90) calendar days from the date of the RFQ closing.

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

The consideration is as provided under the schedule of rates of prices in the prescribed format and submitted with this RFQ.

Dated this _____ day of _____ 2024

Signature of authorised signatory of Respondent: _____

Name of authorised signatory (BLOCK LETTERS): _____

Position: _____

Telephone Number: _____

Authorised signatory Postal address: _____

Email Address: _____

4.2 Selection Criteria

4.2.1 Compliance Criteria

Please select with a “Yes” or “No” whether you have complied with the following compliance criteria:

| Description of Compliance Criteria | |
|---|--|
| a) Respondents are to provide acknowledgment that your organisation has submitted in accordance with the Conditions of this RFQ including completion of the Offer Form and provision of your pricing submitted in the format required by the Principal. | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| b) Respondents are to provide evidence of membership of Australia ICOMOS and registration with the Architects Board of Western Australia as a Professional Architect or Architectural Corporation | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| c) Compliance with the Specification contained in the Request. | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| d) Compliance with the Quality Assurance requirement for this Request. | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| e) Compliance with the Delivery Date. | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| f) Risk Assessment | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Respondents must address the following information in an attachment and label it “Risk Assessment”: | <i>Tick where you have attached a document</i> |
| (i) An outline of your organisational structure inclusive of any branches and number of personnel. | <input type="checkbox"/> Attached |
| (ii) Provide the organisations directors/company owners and any other positions held with other organisations. | <input type="checkbox"/> Attached |
| (iii) Provide a summary of the number of years your organisation has been in business. | <input type="checkbox"/> Attached |
| (iv) Attach details of your referees. You should give examples of work provided for your referees where possible. | <input type="checkbox"/> Attached |

Part 4 COMPLETE AND RETURN THIS PART**Description of Compliance Criteria**

| | |
|---|-----------------------------------|
| (v) Are you acting as an agent for another party? If Yes, attach details (including name and address) of your principal. | <input type="checkbox"/> Attached |
| (vi) Are you acting as a trustee of a trust? If Yes, give the name of the trust and include a copy of the trust deed (and any related documents); and if there is no trust deed, provide the names and addresses of beneficiaries. | <input type="checkbox"/> Attached |
| (vii) Do you intend to subcontract any of the Requirements? If Yes provide details of the subcontractor(s) including; the name, address and the number of people employed; and the Requirements that will be subcontracted. | <input type="checkbox"/> Attached |
| (viii) 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? If Yes, please supply in an attachment the details of any actual or potential conflict of interest and the way in which any conflict will be dealt with. | <input type="checkbox"/> Attached |
| (ix) Are you presently able to pay all your debts in full as and when they fall due? | <input type="checkbox"/> Attached |
| (x) Are you currently engaged in litigation as a result of which you may be liable for \$50,000 or more? If Yes please provide details. | <input type="checkbox"/> Attached |
| (xi) In order to demonstrate your financial ability to undertake this contract, include a profit and loss statement and the latest financial return for you and each of the other proposed contracting entities, together with a list of financial referees from your bank and/or accountant. | <input type="checkbox"/> Attached |
| (xii) The insurance requirements for this Request for Quotation are stipulated in Part 3 of the RFQ. Respondents are to supply evidence of their insurance coverage including, insurer, expiry date, value and type of insurance. If a Respondent holds "umbrella Insurance", please ensure a breakdown of the required insurances are provided. A copy of the Certificate of Currency is to be provided to the Principal within 5 business days of acceptance. | <input type="checkbox"/> Attached |

4.2.2 Qualitative Criteria

Before responding to the following Qualitative Criteria, Respondents must note the following:

- (a) All information relevant to your answers to each criterion are to be contained within your Response;
- (b) Respondents are to assume that the Evaluation Panel has no previous knowledge of your organisation, its activities or experience;
- (c) Respondents are to provide full details for any claims, statements or examples used to address the Qualitative Criteria; and
- (d) Respondents are to address each issue outlined within a Qualitative Criterion.

| | | |
|---|---|---|
| <p>A. Relevant Experience and Personnel</p> <p>Describe your experience in completing/supplying similar Requirements. Respondents must, as a minimum, address the following information in an attachment and label it “Relevant Experience & Personnel”</p> | <p>Weighting 50%</p> | |
| <ul style="list-style-type: none"> (a) Membership of ICOMOS and Architects Board of WA (b) Provide details of similar work completed (c) Provide scope of the Respondent’s involvement including details of outcomes. (d) Key personnel, and their qualifications, skills and experience (e) Personnel roles in the performance of the Contract. | <p>“Relevant Experience & Personnel”</p> | <p>Tick if attached <input type="checkbox"/></p> |
| <p>B. Respondent’s Resources</p> <p>Respondents should demonstrate their ability to supply and sustain the necessary:</p> | <p>Weighting 20%</p> | |
| <ul style="list-style-type: none"> (a) A project schedule/timeline (b) Any contingency measures or backup of resources including personnel (where applicable). | <p>“Respondent’s Resources”</p> | <p>Tick if attached <input type="checkbox"/></p> |
| <p>As a minimum, Respondents should provide a current commitment schedule in an attachment and label it “Respondent’s Resources”.</p> | | |
| <p>C. Demonstrated Understanding</p> <p>Respondents should detail the process they intend to use to achieve the Requirements of the Specification. Areas you may wish to cover include:</p> | <p>Weighting 20%</p> | |
| <ul style="list-style-type: none"> (a) Demonstrated understanding of the Scope of Work | <p>“Demonstrated Understanding”</p> | <p>Tick if attached <input type="checkbox"/></p> |
| <p>Supply details and provide an outline of your proposed methodology in an attachment labelled “Demonstrated Understanding”.</p> | | |

Part 4 COMPLETE AND RETURN THIS PART

| | | |
|--|--|---|
| <p>D. Sustainability</p> <p>Attach a document of maximum 2 A4 pages in length that addresses the following (half page summary for each criterion) and label it “Sustainability”.</p> | <p>Weighting 10%</p> | |
| <p>(a) Environmental Management</p> <p>Provide commentary on how your organisation and the solutions being offered minimise its impact on the environment.,</p> <p>(b) Community Participation and Benefits</p> <p>Provide commentary on initiatives to support Aboriginal Business and indigenous community, local trade support, Australian manufacturing, and community benefit (e.g. Corporate philanthropy or employment development programs for Corporate Social Responsibility such as disability enterprise or special needs).</p> <p>(c) Workplace Practices</p> <p>Provide commentary on how your organisation ensures its staff are treated fairly and their safety assured. This may include non-discrimination (equal opportunity policies and diversity programs), fair remuneration, working hours, and regular employment (versus use of casual and temporary staff). This may also include Employer of Choice initiatives and safe work methods.</p> | <p>“Sustainability”</p> | <p>Tick if attached <input type="checkbox"/></p> |

4.3 Price Information

Respondents must complete the following “Price Schedule”. Before completing the Price Schedule, Respondents should ensure they have read this entire Request for Quotation.

4.3.1 Price Basis

| | | |
|--|------------------------------|-----------------------------|
| Are you prepared to offer a fixed price? | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
|--|------------------------------|-----------------------------|

4.3.2 Price Schedule

| Price Schedule | | | | | |
|----------------|--|----------------|-------------------------|-----|----------------------------|
| No | Service Description | Tender Unit | Price Tendered (ex GST) | GST | Price Tendered (incl. GST) |
| 1 | Review 153 places on LHS, includes site visits, review physical evidence, review management categories, photographic documentation, prepare place record forms | Per hour | | | |
| 2 | Assess nominations of additional places for inclusion in LHS – includes site visits, review physical evidence identify management category, documentary evidence | Per place | | | |
| 3 | Prepare recommendations for any proposed additions to Heritage List | Per Nomination | | | |
| 4 | Prepare LHS document, including graphics, format & presentation. Document to be suitable for online publishing. | Per hour | | | |
| 5 | Provide one bound hard copy of LHS | 1 | | | |