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Quotation – Development of Project Management Framework, Phillip Island Nature Parks

Version 1.0, 17 December 2024

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# Introduction

Jarvis Weston

General Manager Infrastructure and Planning

Phillip Island Nature Parks

[jweston@penguins.org.au](mailto:jweston@penguins.org.au)

Dear Jarvis,

We are pleased for the opportunity to provide a quotation for the development of a Project Management Framework for Phillip Island Nature Parks. We’ve worked to create what we believe is a compelling offer to deliver what we believe is a comprehensive scope of services within your budget. Having worked with many similar organisations in the past, we believe we are ideally placed to create a great, practical outcome that balances your compliance needs with the scope of your projects and the size of your team.

We’d be more than happy to answer any questions you may have in relation to our proposal and are available to come down and run through it in person if required.

Again, thanks for the opportunity to submit.

**A drawing of a bird

Description automatically generated**Kind Regards,

Chris Adams

Director

Stonebank Group Pty Ltd

E: [chris@stonebank.com.au](mailto:chris@stonebank.com.au)

M: 0408 851 556

# Quotation Form

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| **1. COMPANY AND CONTACT DETAILS** | | |
| 1.1 | Trading Name | Stonebank Group |
| 1.2 | Registered Name | Stonebank Group Pty Ltd |
| 1.3 | ACN | 666 058 073 |
| 1.4 | ABN | 30 666 058 073 |
| 1.5 | Street Address (required) | Level M2, West Podium, 525 Collins St, Melbourne, VIC, 3000 |
| 1.6 | Postal Address (if applicable) | PO Box 289, Eltham, VIC, 3095 |
| 1.7 | Telephone Number | 0408 851 556 |
| 1.8 | Email | chris@stonebank.com.au |
| 1.9 | Supplier Contact Name and Position/ Title | Chris Adams, Director |

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| **2. RELEVANT EXPERIENCE** |
| **Company Overview** - Provide an overview of your company |
| Stonebank have strong experience in working with not for profit and government statutory corporations in developing and upgrading their systems and compliance. Our client base includes Vincent Care Community Housing, Villa Maria Catholic Homes, Melbourne Racing Club and the Southern Metropolitan Cemeteries Trust.  Our approach to developing project management frameworks is to work closely with our clients. We believe that on-site face-to-face sessions are the best way to engage with our clients, understand their organisation, and importantly the needs of their teams. This gives us the quickest insight into what you do and how you do it, ensuring we can design frameworks that balance compliance requirements with thoughtful change management.  We are familiar with Phillip Island professionally and personally, with our directors regularly holidaying on the Island, and also managing projects.  We have a strong history developing policy and procedures for organisations outside of the commercial sector including not-for-profits, statutory government corporations, member-based organisations and understand the critical governance and social drivers of these organisations.  The size of our organisation ensures both director-level service and low overheads. More of our fee goes to servicing your project. |
| ***Organisational Experience*** *- Provide an explanation of your organisation’s knowledge and experience in the industry including current and past experience for similar services.*  *Provide two referees for current or recently completed contracts of a similar nature.* |
| Stonebank was established as a project and development management firm, but we have a strong history in providing advisory services to our clients, particularly Project Management Office Advisory. The background of our director Chris Adams has seen him develop procedures and processes in both his past career as a construction executive, and in his current consulting career. More detail is provided on Chris’ experience in Section 3 of this tender response.  We pride ourselves on an approach centred on understanding teams and the way they work. We use this understanding to carefully craft policies and procedures that respond to those needs.  **Southern Metropolitan Cemeteries Trust – Infrastructure Strategy Advisory and Heatherton Road Project Establishment**  Chris Adams was engaged by the Southern Metropolitan Cemeteries Trust (SMCT) to provide consulting services to support their update to their strategic plan, with a focus on infrastructure. Chris undertook a detailed discovery phase with stakeholders across numerous business units to understand how SMCT delivered its services and used that information to provide advice on land use planning which was incorporated into SMCT’s updated Infrastructure Strategy. As part of his review, Chris proposed a new departmental structure which recognised the diverse projects being delivered by SMCT.  Following on from the success of the strategic infrastructure advisory, Chris was appointed to establish and lead a multi-disciplinary team to deliver what was known as the Heatherton Road project. The project sought to create a new memorial park in south-east Melbourne. In establishing the project team and structure, we created a project specific Development Management Pathway, detailing a series of project gates, and dividing the responsibilities for deliverables between the various project sub-teams including:   * Design Vision * Risk and Commercial * Comms and Engagement * Delivery * Operational Activation   The Development Management Pathway provided a simple but effective tool to enable the project team to achieve excellent cohesion and provide all stakeholders clarity on the project’s progress and next steps. We have attached a copy at Attachment 1 – Sample Project Management Gate System to demonstrate the approach taken on that engagement.  Referee:  Angela Uilderks,  Former Chief Operating Officer  Southern Metropolitan Cemeteries Trust  0425 855 670 / [uilderks01@gmail.com](mailto:uilderks01@gmail.com)  **Villa Maria Catholic Homes Project Management Policy and Procedures**  Following an audit of project management systems, we were approached by VMCH to review their current procedures, assess gaps, and develop an updated Project Management Framework, Policies and Procedures. Due to the nature of projects the organization undertakes, across capex, major refurbishment and development projects, a three-tiered approach was developed. The number of gates and documentation requirements differed based upon the project’s particular needs. We have provided the Capex gateway structure at Attachment 1 – Sample Project Management Gate System of this submission as an example of a less complex approach to project management systems.  Our approach was to develop a usable framework which we detailed on the gate structure, then build out policies and procedures to suit. We worked closely with key team members in the development of the framework to ensure we created a workable and usable system.  Some of the key features of the VMCH Project Management Policy were:   * Developed to address specific concerns from an external audit. Our approach was defined by very specific governance requirements * Robust continual improvement framework, that covered not just procedure updates, but also built form outcomes by measuring defect causes * Gate based and tiered to project complexity   Jason Uzice  Former Chief Property Officer  VMCH Limited  0413 413 071 / juzice@mrc.net.au  Ruth Payne  Chief Property Officer (current)  VMCH Limited  0436 486 150 / [ruth.payne@vmch.com.au](mailto:ruth.payne@vmch.com.au) |
| **Sustainability** – Nature Parks endeavours to ensure we work with organisations that operate in a socially and environmentally responsible manner. Please demonstrate how you fit this criterion. |
| The way we interact with society outside of the narrow sphere of our industry is important to Stonebank. One of our key values is ensuring we do work in a way that leaves society in a better place than before.  Stonebank Group recently received final endorsement of our Reconciliation Action Plan and are currently preparing the final design for publication. We are proud of this achievement, and its demonstration of our commitment to reconciliation.  As part of our wider ESG commitment we are well progressed on our journey towards Carbon Neutral certification, with completion of this process mandated by our board to be completed by the end of the current financial year.  Stonebank also takes charitable endeavours seriously, having raised significant funds for the Property Industry Foundation, and donated to social enterprises related to disability training. |

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| **3. CAPACITY AND CAPABILITY** |
| Is provision of the requested services to be sub-contracted? If YES please provide details of proposed sub-suppliers and services to be provided. |
| We do not intend to engage any subcontractors for this scope of services. |
| **Resources** - Provide details of the proposed personnel including team, experience and skills. |
| The project will be led by Chris Adams, a director of Stonebank, as lead consultant. Chris will be responsible for the delivery of the projects and conduct all workshops and consultation. Chris shall be supported by a member of our project management team.  Chris’ career in the built environment sector spans over a quarter of a century. During the 20 years of the first chapter of his career in commercial construction, Chris specialised in commercial and project management, with his career culminating in an executive role with a local subsidiary of one of the world’s largest construction firms. Post his commercial construction career, Chris founded one of the two organizations which combined to form Stonebank and has specialised in leading our advisory function.  Some of Chris’ key relevant experience to this engagement include:   * Commercial management manual development, Probuild Constructions * Commercial management system development and implementation, Atelier Projects * Jobpac cost management software implementation, Atelier Projects * Infrastructure Strategy Advisory (including PMO structure review), Southern Metropolitan Cemeteries Trust * South-East Region Community Memorial Park Project Management Pathway and Organisation Structure, Southern Metropolitan Cemeteries Trust * Project Management Policies and Procedures – Villa Maria Catholic Homes * Project Management Policies and Procedures – Melbourne Racing Club (currently on hold)   Complementing his skillset in policy and procedure development, Chris has significant practical experience in managing projects. Some career highlights include:   * Bendigo Bank Corporate Headquarters Building, Bendigo – Project Manager (Contractor-side). $100m mixed use office and commercial complete 2007 * Royal Victorian Eye and Ear Hospital Redevelopment, Melbourne – Contracts Manager. $350m hospital redevelopment, complete 2022 (active involvement 2011-2015) * South East Region Community Memorial Park, Dandenong – Program Manager (equivalent to Project Director). Thirty-hectare cemetery development, 2020-21 * Isle of Wight Hotel Planning Submission, Cowes – Project Manager. 160 room hotel development, 2022-23 * VMCH Retirement Village, Wantirna South – Director and Project Lead. 300 apartment retirement village and aged care development, Current.   Outside of his professional roles, Chris has acted as a director and treasurer of a child-care co-operative and recently finished a term as school council president.  This blend of significant delivery experience in a number of environments with policy development and implementation experience enables Chris to balance governance, practicality and organizational needs in designing the right system for his clients. |
| **Management Systems -** Suppliers should indicate whether their company has Quality and Occupational Health and Safety or policies and procedures in place and provide evidence. (#delete if not applicable) |
| We operate under the Stonebank WHS Management Plan, a copy of which is available upon request. We don’t have a formal quality management system. |
| **Innovation and Value-Added Services –** Suppliers should indicate any value-add/innovative services they may be able to offer in relation to the provision of the Services. |
| We believe the key value add we offer is a commitment to regularly meeting with your team in person during the development of the project management framework. This is a key differentiator in how we approach our dealings with our clients. We firmly believe the most authentic conversations are held in person and we gain the greatest learnings from your team in this environment. Likewise, building a sense of familiarity and trust between us and your team means that when the policies and procedures come to be rolled out, the end users will be confident that they have been heard, engaged with, and had a key role in developing the procedures they are being asked to work under. This is one of the key success factors in any new roll-out. You will notice in our methodology that we place a large emphasis on the initial phase of our services, understanding your team and how they operate before we start designing systems for you. |

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| **4. METHODOLOGY** |
| Demonstrate an appreciation and understanding of the requirements of the Specification and an outline of the proposed methodology, approach and timeframes. |
| Our process to deliver the framework aligns with the milestones suggested by Phillip Island Nature Parks. We are able to achieve the dates proposed, but also believe there is significant opportunity to reduce the overall timeframe, with completion during April 2025 possible. We have attached a program detailing our approach at Attachment 2 – Proposed Service Delivery Program. We explain in more detail below how this can be achieved.  We understand from the RFQ that some areas of inconsistency in approach have been highlighted by Phillip Island Nature Parks. These include the approach to project planning, delivery, information management, risk and change management, monitoring, project oversight activities such as status reporting, and project closure, as well as documentation such as project plans, project risk assessments and project oversight activities such as status reporting. To give confidence that our approach considers all these items, we have attached a copy of a draft Project Management Framework Outline Brief at Attachment 3 – Draft Project Management Framework Outline Brief. This document outlines the typical considerations we build into a Project Management Framework.  **Phase 1 – Draft Framework**   * 1. **Discovery**   At the commencement of the discovery phase, we issue a request for information contemplating the existing policies, procedures, regulatory requirements, governance requirements and other key organisational documents such as strategic plans, record keeping arrangements, IT systems and organisational charts. A copy of our standard checklist is enclosed at Attachment 4 – Discovery Phase Documentation Request Checklist.  Once this documentation is received, we complete a desktop review which assists us to understand the current operations and ambitions of Phillip Island Nature Parks more widely, and the Infrastructure and Planning team more specifically.  Using the knowledge gained from this process, we design an initial workshop to be held at the offices of Phillip Island Nature Parks. Our goal here is to understand what works well, what doesn’t, and what gaps are perceived by the organisation. An example of an agenda for the workshop is at Attachment 5 – Discovery Phase – Briefing Workshop Record.  The outcomes of the desktop review and workshop form the basis of our discovery report which includes a gap analysis and informs the commencement of our next stage.  At this stage we also develop the consultation plan with the General Manager of Infrastructure and Planning to ensure that we consult with the right team members at each stage of the framework development.  This thorough and methodical approach is key to successfully developing a project management framework that satisfies organisational and governance requirements, but just as critically empowers the project teams to efficiently manage their projects without imposing an unnecessary compliance burden. Our experience tells us that systems that are not user friendly will more often than not fail on implementation.   * 1. **Design**   During the design phase, we take the learnings from the discovery phase and commence development of Project Management Framework. The first step is designing the outline framework.  Once we have the outline framework developed, we will again meet with the relevant members of the Phillip Island Nature Park team to seek endorsement to proceed to finalise the outline framework and move into the next phase.  The draft framework will encompass an outline project management pathway (detailing the gate-based process), and suggested policies, procedures and templates.  **Phase 2 – Draft Procedures and Templates**  Utilising the organisation specific knowledge developed during Phase 1, we start to design the policies, procedures and templates. Once a draft set is complete, we provide for review to the relevant stakeholders, ahead of a workshop to gather feedback. We are looking to find out what the team thinks will and wont work for the organisation. We also take this chance to socialise any governance or compliance requirements that are pushing the documents in a certain direction.  Armed with the team’s feedback we update the draft policies and issue back to Phillip Island Nature Parks for a further review.  During this phase we will also consider options for record management systems and build these into the procedures.  **Phase 3 – Consultation**  At the commencement of the Consultation phase, we will attend Phillip Island Nature Parks to present the Project Management Framework and the associated documents. This will be similar to an induction of the team into the procedures.  We leave the consultation period open for two weeks. During this time, we are available to take feedback from the team as they consider the new system or answer queries they may have in relation to it.  At the conclusion of this phase, we provide a report for Phillip Island Nature Parks management on the consultation period outcomes.  **Phase 4 – Final Framework**  The phase involves making any final adjustments and issuing the completed Project Management Framework and subsidiary documents in a final format. |

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| **5. CONFLICT OF INTEREST** |
| Nature Parks requires all Suppliers involved in this RFQ process to disclose all relevant interests that will or may represent an actual or potential conflict of interest. If you have any such interests, please provide a declaration form of any potential conflict of interest and how any such conflict may be managed. |
| We do not have any conflict of interest in relation to this engagement. |

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| **6. COMPLIANCE TO CONTRACT** |
| The Supplier should indicate a willingness to enter into a contract with Nature Parks. Note any required changes to the terms.  The Buying for Victoria website standard VGPB template contract has been selected for this Program:   * Agreement for the supply of services, standing offer   Whilst reference to the standard agreement template is provided, the Nature Parks will negotiate with the preferred Supplier to ensure terms reflect the nature of the arrangement.  ***If a proposed contract departure is unacceptable to the Nature Parks, the supplier’s quotation response may not be further considered***. |
| We are happy to accept the contract as detailed within the RFQ documents without amendment. |

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| **7. LOCAL CONTENT** |
| Provide any information regarding local content. Information may include but is not limited to location of local offices, employment of local staff and/or contactors, use of local products. |
| Stonebank are a Victorian owned business, based in Melbourne. Local content will be limited to meals and accommodation when attending Phillip Island Nature Parks offices during the duration of our services. |

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| **8. SUPPLIER'S REPRESENTATIVE** |
| Nominate the Supplier's Representative for this Contract. |
| Chris Adams  Director  Stonebank Group Pty Ltd  E: [chris@stonebank.com.au](mailto:chris@stonebank.com.au)  M: 0408 851 556 |

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| **9. INSURANCE (ATTACH EVIDENCE):** | | | |
| **Public and Products Liability** | | | |
| Insurer (Company): | Pacific Indemnity | Policy Number: | 03-ENG-I-0044722 |
| Extent of Cover: | $10,000,000 | Date of Expiry: | 1/7/25 |
| **Professional Indemnity** | | | |
| Insurer (Company): | Pacific Indemnity | Policy Number: | 03-ENG-I-0044722 |
| Extent of Cover: | $2,000,000 | Date of Expiry: | 1/7/25 |
| **Workers Compensation** | | | |
| Insurer (Company): | DXC Claims Management | Policy Number: | 17196127 |
| Extent of Cover: |  | Date of Expiry: | 30/6/25 |

Quotes are requested to show a breakdown of fee per stage. Quotation should include allowances for all disbursements including travel, etc.

**9. PAYMENT SCHEDULE**

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| **QUOTATION BREAKDOWN** | |
| Suppliers are to provide the total of each relevant deliverable below. These deliverable totals must total the Contract Sum. | |
| **Trade** | **Cost** |
| Deliverable 1 | $15,000 |
| Deliverable 2 | $10,000 |
| Deliverable 3 | $3,500 |
| Deliverable 4 | $1,500 |
| **TOTAL FOR ALL DELIVERABLES (Excl. GST)** $30,000  **GST** $3,000  **TOTAL INCLUDING GST** $33,000 | |

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| **10. ANY OTHER RELEVANT INFORMATION** |
| Engagements like this are genuinely exciting to our team. We would love the opportunity to work with Phillip Island Nature Parks to develop your Project Management Framework. |

EXECUTED BY:

Company: Stonebank Group Pty Ltd

Address: Level M2, West Podium, 525 Collins St, Melbourne, VIC, 3000

**Signing by Supplier**

**A drawing of a bird

Description automatically generated**By its representative signing this Quotation, the Supplier acknowledges and agrees to the terms of the RFQ:

Supplier signature:

Supplier print name and position: Chris Adams, Director

Date: 17 December,2024

# Attachment 1 – Sample Project Management Gate System

* + - 1. Heatherton Road Development Management Pathway
      2. Capex Plan of Work

# Attachment 2 – Proposed Service Delivery Program

# Attachment 3 – Draft Project Management Framework Outline Brief

# Attachment 4 – Discovery Phase Documentation Request Checklist

# Attachment 5 – Discovery Phase – Briefing Workshop Record

Contact:

Rialto West Podium  
M2, 525 Collins St  
Melbourne VIC 3000

info@stonebank.com.au