# QUOTATION FORM

|  |  |  |
| --- | --- | --- |
| **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 3095, 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 |

|  |
| --- |
| **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 Philip 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. |
| **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.  Nature Parks reserves the right to contact persons other than those listed by the supplier, if it so determines. Any such persons may be treated as referees in the evaluation of submissions.  Nature Parks shall not be obliged to give suppliers any opportunity to respond to the comments of any referee |
| 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 centered 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**  Describe  Referee:  Angela Uilderks,  Former Chief Operating Officer  Southern Metropolitan Cemeteries Trust  Details  **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 examples of the differing gate structures at Attachment 1 of this submission.  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  Details  Ruth Payne  Chief Property Officer  VMCH Limited  Details |
| **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 Reconcilation 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. |

|  |
| --- |
| **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 lead 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 (current project)   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) |
|  |
| **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.** |

|  |
| --- |
| **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 explain in more detail below how this can be achieved.  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 and organisational charts.  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.  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  Phase 3 – Consultation  Phase 4 – Final Framework |

|  |
| --- |
| **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. |

|  |
| --- |
| **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. |

|  |
| --- |
| **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. |
|  |

|  |
| --- |
| **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 |

|  |  |  |  |
| --- | --- | --- | --- |
| **9. INSURANCE (ATTACH EVIDENCE):** | | | |
| **Public and Products Liability** | | | |
| Insurer (Company): |  | Policy Number: |  |
| Extent of Cover: |  | Date of Expiry: |  |
| **Professional Indemnity** | | | |
| Insurer (Company): |  | Policy Number: |  |
| Extent of Cover: |  | Date of Expiry: |  |
| **Workers Compensation** | | | |
| Insurer (Company): |  | Policy Number: |  |
| Extent of Cover: |  | Date of Expiry: |  |

**9. PAYMENT SCHEDULE**

Quotes are requested to show a breakdown of fee per stage.

Quotation should include allowances for all disbursements including travel, etc.

|  |  |
| --- | --- |
| **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 | |

|  |
| --- |
| **10. ANY OTHER RELEVANT INFORMATION** |
|  |

## EXECUTED BY:

Company: Stonebank Group Pty Ltd

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

**Signing by Supplier**

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