



**T O C A L**  
· H O M E S T E A D ·

CB Alexander Foundation  
'Tocal' Paterson NSW 2421  
Phone: 02 4939 8888  
ABN: 43 187 636 211  
Email: [foundation@tocal.com](mailto:foundation@tocal.com)

**CB Alexander  
FOUNDATION**

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### **1. Purpose of this Invitation**

The CB Alexander Foundation (CBAF) is inviting prospective Respondents to lodge an Expression of Interest (EOI) for the provision of Caretaker Services (the Services) at the Tocal Homestead (Tocal) for a three (3) year period starting from August 2020.

### **2. Background**

CBAF is the owner of Tocal Homestead, located at 957 Tocal Road, Paterson NSW 2421. CBAF is also the owner of the buildings on the historic Tocal Property, including the homestead and outbuildings known as Tocal Homestead. The Homestead is listed on the NSW State Heritage Register No. 00147 and requires proper maintenance in accordance with its obligations under the Heritage Act 1997 NSW and Heritage Regulation 2005 (as amended from time to time).

CBAF operates the site and is responsible for maintaining the heritage value of the property and Tocal Homestead. Activities on site include specialised educational and heritage tours, including education and other learning activities about Australia's early history and farming. The site is also available to the public for weekend visitations, luxury accommodation and as a function venue for a variety of events including weddings.

CBAF requires caretaking services to provide general assistance and monitoring of the operation of the activities as well as on site coordination of accommodation facilities, and dealing with members of the public, necessary to ensure compliance with the Heritage Act on the part of the CBAF.

The current caretaker contract is due for renewal and CBAF is now seeking EOIs from suitable organisations or individuals for the provision of the Services (outlined below).

### **3. The Services**

The Services that CBAF is seeking the Respondent to provide are as follows;

- a. Secure the premises by patrolling the site, monitoring CCTV surveillance, inspecting buildings, equipment and access points, checking on sounding alarms.
- b. Removal of refuse left from events and activities at the Property which the event organizer has not removed.
- c. Effective daily reporting to CBAF on all events and activities by email or other electronic device. A computer is provided by CBAF.



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- d. Answer emails, communication and enquiries in a timely manner. Notify Homestead staff promptly in relation to stock requirements and purchase requests for capital items.
- e. All facets of management of accommodation facilities at *The Barracks* accommodation on the Homestead site. Responsibilities include greeting guests, checking guests in/out, housekeeping, inspection of rooms, back up to cleaning, management of vendor supplies re laundry, linen and guest amenities (bath, coffee, sourcing local produce for the breakfast hamper and delivery of etc), and other tasks related to the smooth running of the boutique accommodation. No cooking required. Laundry is outsourced.
- f. Maintenance of the grounds including watering, mowing, weeding, pruning, feeding and mulching as appropriate.
- g. Manage all stock on the site. Feed pigs and chickens daily.
- h. Maintain generator with monthly checks including regular checks during blackouts.
- i. Providing first aid and emergency support (including adhering to snake sighting procedures) on or about the Property, as necessary.
- j. Engaging in after-hours public relations and liaison including dealing with ad hoc visitors and enquiries.
- k. Carrying out minor maintenance services at the Property in a timely manner. CBAF will provide tools.
- l. Cleaning Tocal Homestead prior to tours / viewings / events. Closing blinds and curtains when setting the Homestead alarm at the end of the day (noting hours when Caretaker is offsite and unavailable), vacuum, sweep, dust and wipe. Clean visitor toilets at least once a week and/or before each ceremony, school or tour and at other times as needed.
- m. Set the bench seats out for each tour and pack away. Set out bench seats for school groups and pack away at the end of the week. Bench seats to be coordinated by the Homestead office on the scheduled 2.5 days the Caretaker is unavailable
- n. Pack away any clothing from wash line, used during school programs. Homestead office to ensure this task primarily performed by tour guides.
- o. Other services reasonably ancillary to the tasks and duties listed above.

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There are no defined hours or minimum or maximum hours for the provision of caretaker services. The Respondent is required to provide the caretaker services as such, with the exception of two and half days per week. These 2.5 days will be agreed upon by both the Caretaker and CBAF ensuring that there is no conflict with activity on site. Where the Respondent nominates an alternate person to be engaged as caretaker, approval must be sought by CBAF to ensure they hold the relevant qualifications.

The successful Respondent will also be required to;

- hold a Working With Children Check (WWCC) which extends to all personnel living on site; and
- undertake training in Farm Chemicals Users Certificate, Operation of Tractor 1 and First Aid of which all will be provided by CBAF.

If the Respondent is unable to perform the Services at any time. The Respondent may propose a replacement of the Respondent for the approval of CBAF. If written approval is provided by CBAF, that approval will be subject to that replacement signing an agreement in the same terms.

The Respondent will live on site in a cottage provided rent free and maintained by CBAF. CBAF will also provide services such as water, phone, electricity, rates and garbage. Currently a farm vehicle is also available for use for Tocal Homestead specific errands.

#### **4. Process**

##### 4.1 Overview

CBAF intends to appoint a successful Respondent based on an evaluation of the submitted EOIs. Please note that the procurement process described is indicative only. CBAF may change or terminate this procurement process at any stage, including by proceeding in a manner which is different to that described in this Invitation.

##### 4.2 Negotiations

Following detailed evaluation of the proposals, CBAF intends to select one preferred Respondent, but reserves the right to select two or more preferred Respondents, to proceed to negotiations with a view to resolving all remaining issues and executing final agreements with the preferred Respondent.

##### 4.3 Timetable

Details of the anticipated timing for the process and the project generally are provided in the table below. This timetable is indicative only and CBAF reserves the right to change the timetable in its absolute discretion.



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EOI Phase	
Release of Invitation	06/02/2020
Site Inspection	05/03/2020 2pm – 4pm
Closing date for lodging EOIs	27/03/2020 5pm
Notification of shortlisted Respondents	17/04/2020
Appointment of Preferred Respondents	03/06/2020
Commencement of successful Respondent	03/08/2020

## 5. Developing your EOI

### 5.1 Developing your proposal

This EOI is seeking to identify a Respondent with the capability and expertise to provide the Services to CBAF.

EOIs will be evaluated against the Evaluation Criteria set out below and your responses to each criteria should contain sufficient information to allow CBAF to adequately assess each response against the respective Evaluation Criteria. Please ensure that all questions are fully addressed and full details are provided. Please provide attachments where necessary.

Respondents must complete the EOI response form set out in Attachment 1 and submit the completed form.

### 5.2 Evaluation Criteria

CBAF is seeking to identify Respondents with the capacity and ability to carry out the Services. EOIs will be evaluated against the evaluation criteria set out in Attachment 1 and Respondents should provide detailed information so that each response can be adequately assessed against the respective evaluation criteria.

### 5.3 Evaluation Approach

In evaluating EOIs, CBAF will;

- Assess EOIs against the evaluation criteria;
- Take into account the extent to which the EOI is;
  - Clear and comprehensive
  - Contains all information required by this invitation; and
  - Responds consistently to each of the evaluation criteria.



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## 6. Procedural Matters

### 6.1 Enquiries

All enquiries in respect to this invitation must be in writing by email and directed to the following nominated contact:

CBAF c/o;  
College Business Manager  
Total College  
[Sandra.ognibene@dpi.nsw.gov.au](mailto:Sandra.ognibene@dpi.nsw.gov.au)

The decision on whether to respond to any enquiry and the content and timing of any response is at the discretion of CBAF. Respondents are encouraged to submit queries as early as possible in the process.

### 6.2 Lodgement Details

The Respondent must lodge their EOI with CBAF prior to the Closing Time and addressed to the College Business Manager, Total College at either:

The College Business Manager  
Total College  
815 Total Road, Paterson NSW 2421

or at

[Sandra.ognibene@dpi.nsw.gov.au](mailto:Sandra.ognibene@dpi.nsw.gov.au)

Any response which is;

- Not submitted prior to Closing Time;
- Incomplete at Closing Time; or
- Not submitted in accordance with the terms and conditions outlined in this document

may be excluded from consideration.

An EOI is, upon submission, the absolute property of CBAF and will not be returned to the Respondents. Nothing in this provision affects the intellectual property rights of the Respondent in the EOI, except that CBAF may make such copies of the EOI as CBAF requires for proper evaluation of the EOI.

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### 6.3 Closing Time

The Closing Time for lodgement of EOIs is 5.00pm, EST on 27/03/2020.

### 6.4 Late Lodgement

If an EOI is not lodged as specified in Section 6.2 by the Closing Time, CBAF may, in its absolute and sole discretion, reject or not consider the EOI.



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## ATTACHMENT 1

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**RESPONSE INSTRUCTIONS: The Respondent is to complete and submit this form in this format.**

A. Confirm intention to bid and provide contact details

Tendering entity details

Legal Entity Name:

Trading Name:

ABN:

Postal Address:

Details of principal contact

Principal contact name:

Principal contact title:

Telephone:

Mobile:

Email:



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B. Evaluation criteria

Evaluation criteria (a)	Demonstrate your ability in meeting the requirements of the services required by CBAF as listed in Item 3. Your answer should also cover working during the hours specified.
Response	
Evaluation criteria (b)	Excellent hospitality skills plays a key component in this role in order to maintain <i>The Barracks</i> 5 star rating. Please demonstrate how your experience will continue to ensure CBAF receives positive ratings and feedback.
Response	





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Evaluation criteria (c)	Demonstrate a learning plan that will enable you to understand the requirements and constraints of operating on a heritage site and in a manner that will maintain the Tocal Homestead brand.
Response	
Evaluation criteria (d)	Please provide an annual monetary value that you wish to be paid for delivery of the Services and how this represents value for money for CBAF.
Response	



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C. Previous contracts and Referees

Have you been involved in any previous contracts relating to, or similar to, the services offered during the past four years? If yes, please provide details.

No	
Yes	

Please provide three (3) names and contact details of current or previous customers to act as referees in relation to **your ability to provide the required service**. Also **state the nature of the work** your company **performed** for these customers.

Name of referee	Nature of the work	Phone number	Email

CBAF reserves the right to consult nominated referees and information obtained from referees may be taken into consideration in the evaluation of tenders.

D. Sub-Contractors

Is any part of the service to be provided through sub-contract?



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Yes	<a href="#">[Please provide details]</a>
No	

Please provide details of proposed sub-contractors legal status (company, partnership, individual, etc.) and their experience and qualifications in provision of similar services.

E. Further Information and Comments on Capacity/Ability to Perform the Intended Contract

State here any other details that you may wish to add. Please also address your capacity to perform the intended contract in the context of any current commitments you may have.



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## F. Insurances

The successful Respondent will be required to take out and maintain during the Term with a reputable insurance company in the name of the Contractor, CBAF and any subcontractor the following insurance policies as a minimum:

- a) public liability insurance, in the amount of not less than \$10 million in respect of each and every occurrence and unlimited in the aggregate for any period of cover;
- b) workers compensation insurance as required by law;
- c) motor vehicle insurance; and
- d) any insurance which is compulsory under the laws for the time being in force in any jurisdiction where the Respondent conducts the Services.

The successful Respondent will, on request, produce to CBAF satisfactory evidence that they have effected and renewed the insurance policies referred to above.

Please list the insurances you currently hold, and the respective amount (or Limit of Liability) for each insurance policy and their expiry dates.

Insurer	Policy type	Policy No.	Limit	Expiry Date

## G. Working With Children Checks (WWCC)

Do you currently hold a WWCC or if not, have the capacity to hold a WWCC?

Yes	<a href="#">[Please provide full details]</a>
No	



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7. Signed by the Tenderer's authorised representative who warrants that he or she has authority to submit this Tender on behalf of the Respondent:

Signature:	
Name:	
Position:	
Date:	