

1. Purpose of this Invitation

The CB Alexander Foundation (The Foundation) is inviting prospective Respondents to lodge an Expression of Interest (EOI) for the caretaker provisions of the Tocal Homestead for a three (3) year period starting from November 2024.

2. Background

The Foundation is the owner of Tocal Homestead, located at 957 Tocal Road, Paterson NSW 2421. The Foundation 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).

The Foundation 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, 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.

The Foundation requires management of all 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 The Foundation.

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

3. The Services

Services include, but are not limited to, the following list of duties of the Manager and its Workers;

Part A - Barracks

(a) Check in and after-hours Service:

- a. monitor bookings, including last minute bookings on weekends and public holidays;
- b. greeting guests face-to-face;
- c. checking guests in/out in person, and utilising lock boxes for late check ins;
- d. housekeeping tasks including preparation of guest rooms both prior to check in and during check in for 'make my room' requirements, ad hoc cleaning as requested by the Foundation from time to time (including cleaning tasks outside the regular cleaning schedule), and management of vendor supplies related to laundry, linen and guest amenities (such as bathroom supplies, coffee, sourcing local produce for breakfast hampers, and delivery of same);

- e. Setting up and packing away rollaway beds;
- f. Oversee and arrange guests' "add on" experiences;
- g. Conducting short guest tours of the Premises;
- h. Monitor cleaning and guest supplies, and replenish stock as needed.

Part B – Site Maintenance

- a. Works closely with the Homestead Coordinator to manage maintenance of the site through a shared database, actioning high priority repairs and maintenance and executing tasks as approved by the Homestead Coordinator. Can arrange monthly meetings with the Homestead Coordinator to discuss maintenance and WHS.
- b. All mowing, whipper snipping and garden management (incl in/around Barracks).
- c. Weeding.
- d. Pruning.
- e. Mulching.
- f. Disposal of green waste.
- g. Feeding of roses and fruit trees.
- h. Maintaining orchard.
- i. Turning on sprinklers to front lawn and orchard when needed.
- j. Maintaining edges of gravel pathways.
- k. Cleaning gutters monthly.
- l. Pressure clean verandas as required.
- m. Blow leaves from stalls and car port area.
- n. Monitor pest control traps, emptying & re-filling bait stations as needed, reporting major pest issues.
- o. Maintain generator with monthly checks including regular checks during blackouts.
- p. Carrying out minor maintenance services at the Property in a timely manner.
- q. Organise relevant tradesperson to complete any maintenance tasks beyond the Manager's level of skill.
- r. Clean Homestead toilets daily.

Part C – Animal Husbandry

- a. Mucking out of pig stalls, feeding pigs, ear tagging pigs, drenching pigs, picking up pig feed, assist in loading pigs for transfer, and general pig welfare.
- b. Contacting the vet directly if any issues with any on site animals arise. Bills to go to the Foundation.
- c. Administering antibiotics etc if needed to animals.
- d. Feeding chickens, organising collection of chicken feed, and general chicken welfare.
- e. Clydesdale's general welfare, haltering and moving into different paddocks when needed, organising the farrier when needed.
- f. Letting out the rams daily, doing the rams water, in contact with Tocal Farm Staff when they need to be moved off site.

- g. Any other general animal husbandry that may arise with existing or new animals to the site.

Part D – Site Security

Secure the premises by:

- a. patrolling the Premises;
- b. monitoring CCTV surveillance and alarm system using FreeControl;
- c. inspecting buildings, equipment and access points;
- d. checking on sounding alarms;
- e. ensure Barracks rooms and Homestead are secured and curtains drawn after guest check out;
- f. provide access for and monitor tradespersons attending the Premises when needed.

Part E – Site Presentation

- a. Prepare Premises before events by:
 - a. raking front of house gravel;
 - b. ensuring no confetti or rose petals remain on front lawn;
 - c. setting up equipment, lectern and/or chairs when required;
 - d. setting up for funerals;
 - e. assisting wedding caterers with emergency site presentation; and
 - f. setting up house hand rails.
- b. Removal of rubbish left from events and activities at the Property which the event organiser has not removed.
- c. Set the bench seats out for each tour and pack away on your rostered days/times on.
- d. Set out bench seats for school groups and pack away at the end of the week.
- e. Assist Homestead Coordinator with site set up and pack down for events, plus BBQ cleaning.

Part F – Other

- a. Effective weekly reporting to the Foundation on all events and activities by email or other electronic device. A laptop and mobile phone will be provided by the Foundation.
- b. Answer emails and communicate in a timely manner. Notify Homestead staff promptly in relation to stock requirements and purchase requests for capital items.
- c. Engaging in after-hours public relations and liaison including dealing with ad hoc visitors and enquiries
- d. Liaise with wedding co-ordinators, supervise ceremony only/photoshoot bookings.
- e. Other services reasonably ancillary to the tasks and duties listed above.

The successful Respondent will also be required to;

- hold a Working With Children Check (WWCC) which extends to all personnel engaged on site; and
- undertake training in Farm Chemicals Users Certificate, Operation of Tractor 1 and First Aid of which all expenses, coordination and compliance will be the responsibility of the Respondent.

4. Qualities

The Qualities that The Foundation is requiring the Respondent to possess the ability to do include:

- a. Communicate freely and openly with the Foundation and third parties
- b. Pay attention to detail
- c. Manage time, including providing accurate estimates of the time it will take to complete certain tasks required in order to provide the Services
- d. Manage and supervise a team including any representatives
- e. Detect problems and resolutions to those problems and promptly respond or report back to the Foundation in relation to the same
- f. Operate flexibly
- g. Undertake works required to provide the services and
- h. Do any and all other things necessary to provide the services to the Foundation in a professional manner

5. Process

5.1 Overview

The Foundation intends to appoint a successful Respondent based on an evaluation of the submitted EOIs. Please note that the procurement process described is indicative only. The Foundation 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.

5.2 Negotiations

Following detailed evaluation of the proposals, The Foundation 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.

5.3 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 The Foundation reserves the right to change the timetable in its absolute discretion.

EOI Phase	
Release of Invitation	12/09/2024
Site Inspection	10/10/2024 2pm – 4pm
Closing date for lodging EOIs	18/10/2024 5pm
Notification of shortlisted Respondents	25/10/2024
Interviews	Week commencing 28/10/2024
Appointment of preferred Respondents	8/11/2024
Commencement of successful Respondent	November 2024

6. Developing your EOI

6.1 Developing your proposal

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

EOIs will be evaluated against the Evaluation Criteria set out below and your responses to each criteria should contain sufficient information to allow The Foundation 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.

6.2 Evaluation Criteria

The Foundation is seeking to identify Respondents with the capacity and ability to carry out the Qualities and 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.

6.3 Evaluation Approach

In evaluating EOIs, The Foundation 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.

7. Procedural Matters

7.1 Enquiries

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

The Foundation c/o;
Homestead Coordinator
The Foundation
homestead@tocal.com

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

7.2 Lodgement Details

The Respondent must lodge their EOI with The Foundation prior to the Closing Time and addressed to the Homestead Coordinator, The Foundation at either:

The Homestead Coordinator
CB Alexander Foundation
815 Tocal Road, Paterson NSW 2421

or at

homestead@tocal.com

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 The Foundation 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 The Foundation may make such copies of the EOI as The Foundation requires for proper evaluation of the EOI.

7.3 Closing Time

The Closing Time for lodgement of EOIs is 5.00pm, EST 18/10/2024.

7.4 Late Lodgement

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

ATTACHMENT 1

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:	<input type="text"/>
Trading Name:	<input type="text"/>
ABN:	<input type="text"/>
Postal Address:	<input type="text"/>

Details of principal contact

Principal contact name:	<input type="text"/>
Principal contact title:	<input type="text"/>
Telephone:	<input type="text"/>
Mobile:	<input type="text"/>
Email:	<input type="text"/>

B. Evaluation criteria: qualities, services as per annexure A

Evaluation criteria (a)	Demonstrate the ability of your workers in meeting the requirements of each of the services required by The Foundation as listed in Item 3.
Response	
Evaluation criteria (b)	Demonstrate how you will ensure your workers possess the Qualities required by The Foundation as outlined in Item 4
Response	

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



Evaluation criteria (c)	Demonstrate a learning plan that will enable your workers 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 + GST that you wish to be paid for delivery of the Services and how this represents value for money for The Foundation.
Response	

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

The Foundation 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

Are any parts of the services to be provided, to be through sub-contract?

Yes	[Please provide details]
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, The Foundation 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 The Foundation 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 and your workers currently hold a WWCC or if not, have the capacity to hold a WWCC?

Yes	[Please provide full details]
No	

8. 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:	