

Queenstown Lakes District Council

Request for Proposal

Contract Name: **Wanaka and Frankton Masterplan Services**

Contract Number: **19-008**

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How to use this document

This Request for Proposal (RFP) consists of:

Section A	Background and Scope of the Project
Section B	Proposal process
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Sections A, B, C, and D of this document provide background information, instructions and conditions that apply to this RFP process. You need to read and understand these sections. Your acknowledgement of these requirements and conditions is set out on the RFP Acknowledgement Form in Appendix 1.

Section E of this document sets out the information required in your proposal submitted in response to this RFP.

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Section A – Background and Scope of the Project

1. Background and Overview

1.1 Background

The Queenstown Lakes District is currently experiencing considerable and sustained growth from both local and visitor sectors. This growth is forecast to continue into the future. The scale and pace of growth is placing considerable strain on current infrastructure and amenity throughout the Queenstown and Wanaka urban areas. This pressure will increase as the growth continues.

There is however an opportunity to provide a clear and coherent masterplan in key areas to ensure that the appropriate infrastructure is provided to support this growth, while also ensuring that the liveability of these areas is enhanced.

Two areas that are experiencing substantial growth and that have been identified as needing a clear plan to manage this growth are Wanaka and Frankton. While both have very specific and different issues, fundamentally both are in need of a clear and supported transport plan and Masterplan to ensure that the future outcomes are what is desired rather than simply occur.

For several years the community have been observing and experiencing the effects of this growth first hand and have become frustrated at the missed opportunities and deterioration in the quality of the public realm. Equally, the development community in these areas is looking to QLDC and its investor partners to provide certainty around the future direction and investments within Wanaka and Frankton so that they can have confidence that their developments can support and harness this investment.

While there have been various business cases and plans previously produced, there is currently no document that brings all of these together into an agreed visual sequence showing how they are integrated in a cohesive manner at each of these locations.

A similar process has recently been undertaken for the Queenstown Town Centre and this is providing the clarity of outcomes and the subsequent future investment for all parties.

New masterplans for Frankton and the Wanaka Town Centre are needed to bring together proposed project work streams and to show, in a very visual and evidence-based way, how and why they intend to be developed. From an investment perspective, the principle of telling the whole story is stronger than its individual parts. It is intended that the masterplans and associated programme business cases be developed using the New Zealand Transport Agency Business Case framework.

The masterplans will guide interventions designed to enrich Wanaka and Frankton in the following ways:

- Having a clear vision.
- Recognising and celebrating the distinctive areas and what their future look and feel will be.
- Enabling quality space and priority for pedestrians
- Getting ahead of the game with managing traffic – how it flows currently and how it will be accommodated in the future.
- Using the land and levers available to QLDC to manage the demand for parking and where it is supplied.
- Futureproofing options that allow for more futuristic innovations to occur
- Enhancing walkable, cycle-friendly streets and public open spaces.
- Promoting quality design and diverse activation of spaces.
- Better attracting government investment via the Business Case approach.

1.2 Purpose and Objectives

This contract is focussed on the development of a Masterplan **AND** an Integrated Transport Programme Business Case (ITPBC) for Frankton and the Wanaka Town Centre. These two elements are expected to deliver:

- **Masterplan:** A 30 year vision, explained through a Spatial Framework focussed on public realm improvements that are integrated and aligned with land use. The Masterplan will incorporate high quality urban design and an active interface with the lakefronts, while maximising access by all transport modes and review the supply and management of parking.
- **Integrated Transport Programme Business Case:** A preferred programme of transport improvements, aligned and integrated with land use, which supports both the preferred Masterplan and the transport needs of the wider urban area.

The objectives of taking an integrated approach in completing the Masterplanning and ITPBC processes at the same time is to:

1. Integrate all plans, strategies and projects impacting on these areas.
2. Provide Local Government, Central Government and private stakeholders confidence to invest.
3. Align infrastructure planning and land use to create optimal outcomes.
4. Ensure these areas remain liveable, making for a positive experience for residents, visitors and businesses.

This integrated approach has been used to progress the development of a Masterplan for the Queenstown Town Centre. The Masterplan Programme Business Case and associated Indicative Business Cases were approved in December 2017 with specific projects included within the Ten Year Plan, adopted in July 2018. To date, the Masterplan process has been a well-received, positive collaboration with key partners, stakeholders and the community.

1.3 Programme Partners

The Queenstown Lakes District Council (QLDC) transport investor partners are the New Zealand Transport Agency (NZTA) and the Otago Regional Council (ORC). The NZTA are both the highway operator for the arterial roads that feed the Wanaka and Frankton areas and the financial investor that contributes up to half of the cost of transport capital projects. The ORC is responsible for delivery of public transport services and has been responsible for the roll out of an enhanced bus service for the Wakatipu which commenced in November 2017.

1.4 Integrated implementation

The importance of completing the Masterplan and ITPBC for the external funding timeframes is a critical consideration for this programme of work. Important for this funding story will be how investment in these areas compliments or supports other planned investment.

More specifically for the Frankton Masterplan, it is important that this work is progressed in collaboration with the following contracts being undertaken in parallel:

- Queenstown Town Centre Detailed Business Case (QT DBC) – This business case will be developing the recommended option for town centre transport enhancements.
- Frankton to Queenstown Single Stage Business Case (F2Q SSBC) – This business case will be developing the recommended option for this corridor, including the predicted demand by mode along the corridor.
- Lake Wakatipu Public Water Ferry Service DBC – This business case will be developing a case for ferry services on Lake Wakatipu and the resultant infrastructure required.
- Grant Road to Kawarau Falls Bridge DBC – This business case is currently under development and is considering options to increase road capacity along the section of SH6 between Grant

Road and Kawarau Falls bridge. A critical focus of the option development has been on improving the access for active modes.

- Wakatipu Active Travel Network Business Case – This business case will see the identification and progression of the recommended active travel network throughout the Wakatipu area.

The Consultant is expected to interface with the above teams for these projects as is necessary to obtain and share information required to deliver the scope of this commission.

2. Purpose & Project Scope

2.1 Purpose and General Scope

QLDC wish to procure a suite of technical resources (in the form of **two** multi-disciplinary consultant teams) to assist with implementing a Masterplan and ITPBC for Wanaka and for Frankton.

This RFP is a single tender process requiring a single tender proposal covering both the Wanaka and Frankton projects listed below. QLDC are seeking a separate consultancy team (from different organisations) for each project.

1. Wanaka Town Centre Masterplan and Integrated Transport PBC
2. Frankton Masterplan and Integrated Transport PBC

Each consultancy team that submits a tender must be prepared for either the Wanaka or Frankton project to be awarded to the team. There will be two separate contracts awarded to the top two preferred tenderers. One contract will be awarded for the Wanaka project and the other contract will be awarded for the Frankton project. QLDC will decide which contract will be awarded to which preferred tenderer.

These works will form the basis for future funding applications for the Otago-Southland Regional Land Transport Plan, National Land Transport Programme and QLDC's Draft Long Term Plan (2021-2031).

2.2 Masterplan Outcomes

The aim of the Masterplans will be to identify a holistic and unified aspiration and vision for the Wanaka Town Centre and Frankton, collaborating with key stakeholders and partners to agree on a desirable future state for these areas. The Masterplan process will consider various options and opportunities, and develop a feasible plan that encompasses multiple aspects such as:

- enhancing the quality of the public realm through its look and feel (e.g. paving, planting, street furniture, etc)
- placemaking opportunities
- maximising connectivity and managing the interface with the waterfront
- providing access by all modes of transport
- reviewing the supply and management of parking to support access by both residents and visitors.

The Masterplans will consider the multiple roles of the areas; as tourist destinations, commercial centres and community hubs. The Masterplans will also consider opportunities to enhance these existing roles while addressing known and anticipated problems arising from growth in the number of residents and visitors.

It is likely that the Masterplans will see a move away from the current vehicle-dominant centres, towards a more people-focussed centre. This desire has been articulated clearly in previously developed documents and aligns well with the Government's focus on mode neutrality, and encouraging walking, cycling and public transport.

The components of the Masterplans will be co-ordinated through a Spatial Framework document. The Spatial Framework is to present a compelling vision for the future of the areas that reflects and enhances the local identity through sound planning, design and placemaking principles. It would seek to build upon

and enrich the vibrancy, environmental qualities and character of the two areas. The document would describe and identify the public realm network and how it would integrate with proposed key catalyst projects and opportunities for re-development.

The document would outline the key moves and strategies that will have informed the Masterplans and visions for the two areas. It would include an Implementation Plan explaining how the strategy and actions should be coordinated and delivered. The Spatial Framework would also drive Public Realm Design Guidelines to guide the design strategy and coordinate the material palette for any future open space, pedestrian and cycleway upgrades.

Engagement with partners, stakeholders and the wider community is expected to be a significant part of the Masterplanning process. QLDC will lead this engagement, however the consultant team is expected to develop a Communications and Engagement Plan (which incorporates both the Masterplan and ITPBC processes), for QLDC approval. The consultant team will also need to provide technical support during the process.

3. Programme Business Case Requirements

It is expected that the scope of the Programme Business Case will include access to key destinations such as schools, centres and employment areas by all modes, as well as public realm and placemaking initiatives. Several programmes will be tested, and are likely to include both hard (infrastructure) and soft (e.g. policy, behaviour change, etc.) measures. The preferred programme will identify where further work is required, costs/benefits and next steps.

The development of the Programme Business Case will run in parallel with the Masterplanning, with the Masterplan strategy providing critical context for the ITPBC.

The New Zealand Transport Agency business case approach will be used as the basis for the deliverable of the PBC. The requirements of this approach can be found at <https://www.nzta.govt.nz/roads-and-rail/highways-information-portal/processes/project-development/programme-business-case/>.

This approach can be summarised by the steps below:

3.1 Confirmed Strategic Case

The first step of the PBC process is to confirm the strategic case is still appropriate given any new evidence that has been since gathered or known changes in the environment.

3.2 Problems/Opportunities and investment Objectives

There has been previous work undertaken on the problem and benefits in these area of the network. This contract will review this previous work with stakeholders to confirm the problem, and benefits statements as well as identifying the investment objectives. This step is very much business case process focussed. This step will also include the development of the outcomes sought for the Masterplan and the Vision for the specific area. This process should include all partners and stakeholders.

3.3 Develop and Assess a List of Alternatives and Options

It is essential for the Consultant to develop alternatives and options that reflect the full range available and that seek to meet the business case's defined investment objectives, not just immediate manifestations of problems.

By way of definition 'alternatives' refer to types of activities such as improvements to the centres, highways, local roads, public transport, walking and cycling improvements, land use measures and travel demand management, that are other means of achieving the same programme objectives.

The Consultant should explain how they propose to undertake alternative/option generation and any sifting necessary to reduce the number of options and their combinations to manageable levels in a logical, transparent and therefore auditable manner.

On identifying a short list of feasible alternatives and options the Consultant is required to test each alternative against the investment objectives and key criteria.

This assessment should involve a qualitative assessment with appropriate effort focused towards alternatives and options which merit more detailed development through the indicative and detailed business case phases and eliminate options which are unlikely to meet the investment objectives, alleviate problems or realise opportunities identified in the strategic case.

The assessment of alternatives and options in the PBC should concentrate on the following areas:

- An initial assessment of the likely impact against investment objectives;
- An initial assessment of the likely impact of alternatives/options against BROAD criteria associated with the feasibility, affordability and likely public acceptability of alternatives/options
- An initial assessment of the likely impact of alternatives/options against:
 - Environmental and social;
 - Safety;
 - Economic.

At this stage in the PBC consultants must produce an indicative assessment of the scope and scale of the benefits and impacts associated with an alternative/option for each area noted above.

In assessing alternatives the Programme Business Case Alternatives Assessment template should be utilised to provide a succinct, plain English, assessment of alternatives. A digital and latest version of the summary table is available at <http://hip.nzta.govt.nz/processes/project-development/programme-business-case>

3.4 Programme Development and Assessment

The Consultant shall investigate the possibility of packaging alternatives and options in order to achieve the desired outcomes. It is likely that no one alternative or option measure on its own will provide a solution to the problems within a study area. Packaging measures effectively can:

- Reinforce, extend or complement the impact of a particular measure;
- Mitigate potential adverse impacts of a particular measure; and
- Increase public acceptability of a particular measure.

It is important to recognise cumulative impacts which may arise from the packaging of measures. This should be accounted for fully during analysis.

The remaining alternatives and options should be assessed in the form of programmes. Again this is not a detailed evaluation of the alternatives and options but a broad brush evaluation using a high level assessment.

The assessment should include:

- Broad contribution to addressing the identified investment objectives;
- An assessment of broad benefit range;
- An assessment of broad dis-benefit range;
- An assessment of broad investment and operational cost range;
- An assessment of risks;
- An assessment of the programme profile and benefit cost ratio range;
- A likely phasing and implementation time frame;
- An overall ranking of each programme;
- A initial Monitoring and Evaluation Plan; and
- A recommended programme or programmes for consideration.

Key environmental and social impacts should be considered at a high level in these programmes. The consultant should refer to the Transport Agency's Minimum Standard Z/19 - State highway environmental & social responsibility standard.

The Consultant shall provide an overview of the overall recommended programme of work. This involves identifying and describing:

- The work that is needed with broad timelines including all that is able to be determined at this stage;
- The level of outcomes that will be achieved; and
- The investment risk.
- This is a high level overview and is not expected to be a detailed definition of the programme.
- In providing a recommended programme the Consultant shall separately identify:
 - The essential elements that must be successfully delivered;
 - The desirable requirements that would add value and bring about additional benefits but are not essential to successful delivery;
 - The optional requirements i.e. those things that might be delivered if sufficient budget were to be available; and
 - The elements that are specifically excluded from the programme (to prevent scope creep).

The Consultant shall ensure that the programme identifies key implementation activities by time (or any other trigger such as growth thresholds) to deliver the desired outcomes. Where there are complementary activities such as other interventions (examples include local road construction, other mode improvements, land use and other) these should be identified and their monitoring specified.

4. Wanaka Town Centre Master Plan and Integrated Transport PBC

4.1 Background

More people are living and working in Wanaka than ever before, and the town is increasingly popular with domestic and international visitors. A period of unprecedented growth has led to pressures on existing infrastructure, such as parking and visitor facilities. Increasing growth has also led to undesirable outcomes that detract from the experience of visiting Wanaka, such as traffic congestion and delays.

In response to the community's frustration with the effects of this growth, multiple community/advocacy groups have developed plans and visions for Wanaka. The Council's primary response of late has been through the Proposed District Plan, but this is focussed on managing land use rather than the broader issues. Other relevant Council documents, such as the 2008 Structure Plan are due for review.

It is clear that a co-ordinated approach is required, and in the Long Term Plan 2018-28 the Council committed to undertake an integrated land use and transport planning project for Wanaka, as well as a Future Development Strategy within the Wakatipu and Wanaka which will be undertaken in parallel.

The integrated land use and transport planning project consists of two closely linked elements being the Wanaka Town Centre Masterplan and the Wanaka Integrated Transport Programme Business Case

The two workstreams will run in parallel and will be developed iteratively, with a high level of collaboration with stakeholders and the community throughout the process. The NZ Transport Agency's Business Case Approach will guide the process that will encourage critical thinking and ensure decisions are evidence-based.

It is anticipated that the Wanaka Community Board, with its local expertise and strong links to the wider community will play a key role and, along with an Advisory Group of specialists, act as a sounding board for the project team. Together, these members will provide immediate feedback at key stages for the project team to consider.

The Town Centre Masterplan will focus on the CBD area, whereas the Integrated Transport Programme Business Case will cover a wider geographic area. The business case workstream will incorporate Masterplan options but will also consider the wider transport needs of the growing Wanaka urban area,

and the need for access to multiple destinations, including the CBD, local schools and airport, as well as the emerging activity centres at Three Parks and Northlake.

4.2 Strategic Context

QLDC's community aspirations for the district include the following:

- Sustainable growth management.
- Quality landscapes and natural environment with enhanced public access.
- A safe and healthy community that is strong, diverse and inclusive for people of all age groups.
- Effective and efficient infrastructure that meets the needs of growth.
- High quality urban environments, respectful of the character of individual communities.
- A strong and diverse economy.
- Preservation and celebration of the district's local cultural heritage.

There are a number of inputs that will need to be considered in the development of the Masterplan and the ITPBC as outlined in the *Establishment Report: Wanaka Integrated Transport Programme Business Case and Town Centre Masterplan* (web link provided in Attachment 1). The two critical ones are the Strategic Case (web link provided in Attachment 1), which was approved by NZTA on 21 August 2018, and the Initial Community Engagement feedback which will inform the Town Centre Vision Workshop.

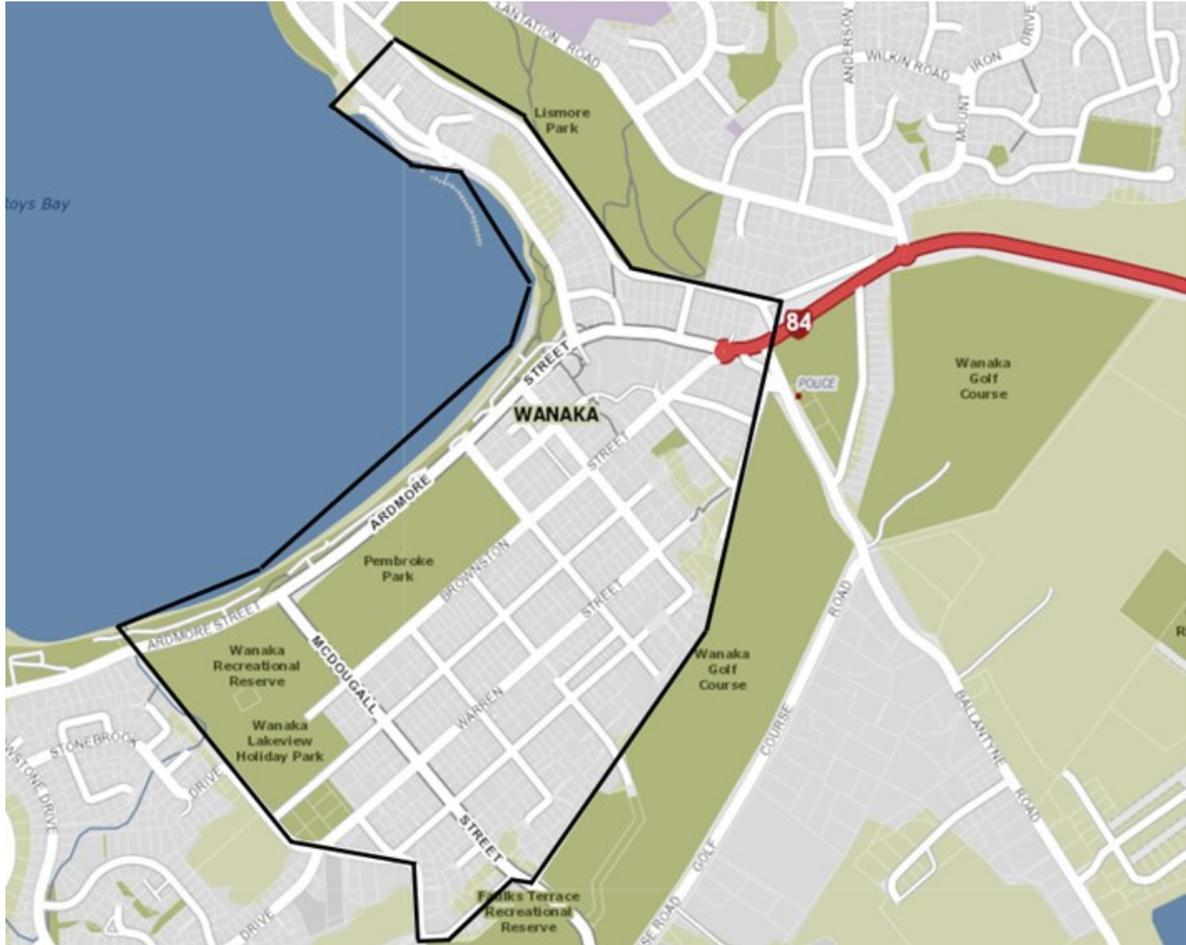
4.3 Wanaka Town Centre Masterplan

The Masterplan will build upon the Strategic Case, initial community engagement feedback and Vision for the Town Centre with a 30 year planning horizon. The Masterplan will be design-led, with the visioning workshop at the outset.

The aim of the Masterplan will be to identify a holistic and unified aspiration and vision for Wanaka Town Centre. The components of the Masterplan will be coordinated through the Spatial Framework document which will also include Public Realm Design Guidelines to guide the design strategy and coordinate the material palette for any future open space, pedestrian and cycleway upgrades in the town centre. The guidelines would tie into the Lakefront Development Plan and applicable Reserve Management Plans.

The study area of the Masterplan is focused on the Town Centre, Lakefront and surrounding area. It encompasses the Town Centre and Town Centre Transition zones as defined in the Proposed District Plan. It also includes the area between Lismore Park and the Lakefront, Pembroke Park, Wanaka Recreational Reserve and adjacent residential/commercial areas. This area is broad enough to provide many opportunities to enhance the form and function of the Wanaka Town Centre.

The Town Centre Masterplan study area incorporates the area covered by the Lakefront Development Plan. The Council already have a commitment to deliver the Lakefront Development Plan, and implementation is underway. The Masterplan will need to consider and respond to the Lakefront Development Plan, focussing on the interface between the Masterplan area and the Lakefront area to ensure a high degree of connectivity and visual harmony. The Masterplan will also need to consider overall parking needs but specifically explore the effects of, and response to, Lakefront parking that will be displaced as a result of the Lakefront Development Plan.



4.4 Wanaka Integrated Transport Programme Business Case

The focus of the Wanaka ITPBC will be to respond to the problems and opportunities identified in the Strategic Case, and support and enable the changes identified in the Masterplan. The development of the Programme Business Case will follow the initial Master planning exercises, but there will be overlap to test options for both workstreams.

It is expected that the scope of the Programme Business Case will include access to key destinations such as schools, centres and employment areas by all modes, as well as public realm and placemaking initiatives. Several programmes will be tested, and are likely to include both hard (infrastructure) and soft (e.g. policy, behaviour change, etc.) measures. The preferred programme will identify where further work is required, costs/benefits and next steps.

For the business case workstream, the study area is substantially larger than the Masterplan area to capture the transport and land use impacts of the wider area. This area has been defined to incorporate all development areas included in the PDP for Wanaka, and includes links to the Airport and Luggate. The business case study area does not encompass surrounding townships such as Hawea, Glendhu Bay, Cardrona and Luggate, but will broadly include transport options to and from these centres, as transport flows from these areas influence demands within the study area. The business case may consider tourist routes to Treble Cone, Mount Aspiring and Queenstown; this will be ascertained at the Strategic Case stage, based on a review of the evidence.



There are a number of specific elements that will need to be integrated in the delivery of the Wanaka ITPBC and the Wanaka Town Centre Masterplan. The specific focus of these elements is outlined below:

- **Arterial road network** – The form and function of the strategic road network in the wider Wanaka area needs to be identified, including linkages to key community facilities (such as the airport and key recreational facilities).
- **Parking strategy** – The long term role of parking, including the location of supply and its form (i.e. off street versus on street), charging regime and how the Town Centre in particular will interface with this parking supply. The future role of technology should be considered.
- **Public Transport** – Identify the role, form and location of public transport into the future for the wider Wanaka area. This should include key interchange locations and the integration of these locations with the form and amenity of the Town Centre
- **Walking and Cycling** – Identify the form and function of required active mode linkages through Wanaka and in particular to the Town Centre.

4.5 Programme

It is the expectation of QLDC that this work, including the Wanaka Town Centre Masterplan and Wanaka ITPBC will be completed by June 2019.

5. Frankton Master Plan and Integrated Transport PBC

5.1 Frankton Background

As a transport gateway for residents and visitors, Frankton shapes experiences for millions of people each year. Equally important is Frankton as a centre for commercial and industrial activity, community facilities, recreation and social services.

Frankton is a pivotal hub for the district and region and currently lacks a clear vision and spatial framework that can proactively integrate transport planning with land use to meet future demands and improve liveability. Without clear ownership, the situation in Frankton is unlikely to improve.

However, with a clear, coherent and ambitious plan there are significant opportunities to build on and improve Frankton through positive partnerships between the public and private parties that make up the local landscape.

Given much of Frankton is under private ownership, it will be critical for QLDC, NZTA and ORC to work closely with their stakeholders, business and the community to deliver the Frankton Masterplan.

The growth in Frankton is also creating current transport challenges that are forecasted to only worsen. Accessibility to this key gateway of Queenstown is critical to the success of the town.

The integrated land use and transport planning project consists of two closely linked elements being the Frankton Masterplan and Integrated Transport Programme Business Case. The two workstreams will run in parallel and will be developed iteratively, with a high level of collaboration with stakeholders and the community throughout the process.

5.2 Frankton Masterplan

The Frankton Masterplan will outline a 30-year vision for Frankton that will be described and explained visually through a Spatial Framework document. It will bring together key agencies, stakeholders and the community to create a shared vision for the future of Frankton and set the direction through transparency and collaboration.

It will act as a central pivot point, bringing together Local Government, Central Government and private land use initiatives while adding a Frankton lens to a range of transport initiatives programmes and strategies.

Key to this process is ensuring the Masterplan serves the needs of QLDC, NZTA and ORC – who all have significant roles to play, particularly in terms of the public transport, active travel and transport networks. Ensuring private developers are engaged in the process is also critical to its success, particularly with respect to the amount of land that is privately held across Frankton.

While several plans and strategies have been created, there are none that specifically look at Frankton in the level of detail required.

The development of a Spatial Framework showing what should/could go where and why, would add confidence to investors and help map out a plan for the future of Frankton. The Spatial Framework not only shows what the future looks like in the Frankton context, it also helps define Frankton in the wider Queenstown context as a critical piece of the puzzle.

There is a wide and complex range of issues at play, which exist on a scale of control, influence and interest (refer Potential Workstreams diagram within the *Frankton Masterplan Establishment Report* - web link provided in Attachment 1). Some issues can be controlled by QLDC and its partners as part of this Masterplan, others can be influenced or supported, while others are of interest but ultimately cannot be shaped by the masterplanning process, as it currently stands.

The objectives of the Frankton Masterplan are to:

- integrate all plans, strategies and projects impacting on Frankton;
- provide Local Government, Central Government and private stakeholders confidence to invest;
- align infrastructure planning and land use to create optimal outcomes for Frankton; and
- ensure Frankton remains liveable, making for a positive experience for visitors, residents and businesses.

The Masterplan will focus on the physical interventions and consider the contextual, heritage, cultural, infrastructural and development overlays that will integrate the current and future potential opportunities (e.g. civic, recreational, environmental, land use, streetscape, transportation and development).

The Spatial Framework will provide a strong visual story illustrating why the various interventions are a priority, how they are prioritised and how they are sequenced for implementation.

The preliminary geographical scope of the Masterplan is the area north of and including the Frankton Marina extending to the Kawarau and Shotover Rivers. The area of influence extends beyond Frankton

across into Shotover Country and Lake Hayes Estate, east to Queenstown and south to Drift Bay and around to Kelvin Heights as shown below.



Frankton is an area with a wide range of influences. Work done as part of this Masterplan will inform and provide benefits to a much wider area. The Masterplan is an opportunity to get ahead of Queenstown's growth curve to have a positive effect on other plans and developments.

5.3 Frankton Integrated Transport PBC

Transport and land use exist in an interdependent relationship. At present, the Frankton transport system both within and linking to Frankton is not appropriately developed to service current and future land uses. At the same time, development is continuing without a clear vision and this is having an increasing impact on the transport system.

A plan for Frankton that looks at how the transport system and land use (including sports, community and cultural facilities, education and healthcare) are catered for has not been adequately addressed.

A critical piece of the puzzle is the Queenstown Integrated Transport Programme Business Case (QITPBC) jointly developed by NZTA, QLDC and ORC in 2017. This document sets the strategic direction for NZTA investment across the Wakatipu Basin and outlines many key transport initiatives in Frankton.

The problems identified in the QITPBC provide the 'headline' problems but there is a need to delve in to the detail of Frankton. The Masterplan will offer a level of granularity to further define and improve the overarching problem statements in the QITPBC as the strategic context is reviewed and revised within the PBC.

There are multiple transport issues affecting Frankton. Some of these are being partially addressed by the QITPBC projects, but there remains an opportunity to look at them with a finer grain to better understand the problems and opportunities. These include:

- Roothing network including State Highways and local roads
- Public transport
- Ferries
- Mass Rapid Transit
- Active travel connectivity
- Queenstown Airport
- Freight management
- Emergency services
- Rental cars

The ITPBC will need to understand these aspects of the transport network, how they integrate with land use in the area and identify options to address these challenges.

A range of public and private land uses are at play within Frankton and the surrounding area, creating both challenges and opportunities to the transport system. These include:

- Residential development both in and around Frankton
- Commercial development and operations
- Queenstown Airport
- Health and education
- Community, cultural and sporting facilities
- Public spaces and places for people

A significant amount of land in Frankton is held privately. Development has moved forward without a coordinated approach to the form and function of an integrated Frankton. The Masterplan will offer a shared vision and framework to guide future direction and investment.

5.4 Programme

It is the expectation of QLDC that this work, including the Wanaka Masterplan and Wanaka ITPBC will be completed by July 2019.

6. Client's Expectations

The Queenstown Lakes District Council (QLDC) is looking for two consultant teams who will;

1. Promote and deliver the objectives and requirements of either the Wanaka or Frankton Town Centre Masterplan and ITPBC.
2. Provide high quality and innovative design outcomes in line with the timeline and budget.
3. Work collaboratively within the multi-disciplinary team, other external consultants, partners and stakeholders to deliver smart design and compelling narrative.
4. Provide a high level of confidence that the contract delivery methodology will deliver the required outcomes.

Participants are urged to demonstrate in their submissions that they understand the requirements of the RFP documents and that they can provide the necessary resources, commitment and skill levels to successfully complete the contract works, taking note of the above expectations.

Section B - Proposal Process

7. Purpose of Request for Proposal

The purpose of this RFP is to invite proposals for a multi-disciplinary team of design and business case consultants to deliver an integrated Masterplan and PBC for either Wanaka or Frankton, in accordance with this RFP.

The objective of this RFP is to engage two teams of experienced professional service providers (the Consultant Team), to provide effective urban design masterplanning, transport/traffic engineering and business case services for the delivery of either the Wanaka or Frankton project (one for each team).

It is the intention of the contract that the two best performing tenders will be awarded one of the contracts each (i.e. Wanaka or Frankton).

For clarity, a single tender per company/team is to be submitted and this tender allows QLDC to award a contract to this company/team for either the Wanaka or Frankton integrated Masterplan and PBC. The RFP will only be evaluated against the Wanaka base estimate.

8. Outcomes

Following the evaluation of proposals received and methodology and price clarification, QLDC may:

- enter into negotiations with the shortlisted Participants
- award a contract to the preferred Participants
- conclude or abandon the process without negotiating or awarding any contracts.

QLDC may for the purposes of any negotiations amend the proposed contract structure, description of the services required or any other aspect of this RFP.

QLDC may at its sole discretion cancel this RFP process at any time.

9. Timetable

The *anticipated* timetable for this RFP process is:

Activity	Date
RFP Issued	24 August 2018
Deadline for requests for clarification on this RFP	14 September 2018
RFP close at 2.00pm	21 September 2018
Shortlisted Participants notified	08 October 2018
Shortlisted Participants presentations (if required)	10 October 2018
Negotiation with preferred Participants	11-12 October 2018
Contract awarded	15 October 2018
Contract start date	22 October 2018

Please note that this timetable is indicative only and may be subject to change at the sole discretion of QLDC. Participants will be notified of changes by the authorised representative.

10. RFP Acknowledgement and Submission of proposals

10.1 Acknowledgement

Participants are required to acknowledge receipt of the RFP documents and to agree to the basis upon which the RFP process is being undertaken by completing the RFP Acknowledgement Form (Appendix 1) and returning it to the address set out in the form by the RFP Acknowledgement Date contained in the timetable in item 6 above. The Participant shall advise on this form the name and address of the contact person(s) authorised to communicate with QLDC on behalf of the Participant in relation to this RFP. The Participant acknowledges that QLDC shall not be obliged to deal with any person(s) other than the person(s) so authorised.

Upon receipt of the Acknowledgement Form, Participants will be provided with instructions to access the relevant reference documents for the purpose of responding to this RFP.

10.2 Proposal Submission

The RFP submission must be submitted in two separate files as follows:

File 1: Proposal Excluding Price

File 2: Price

Files 1 and 2 must be marked with the tenderer's name and:

- i) Contract CT-19-008 – Proposal Excl. Price
- ii) Contract CT-19-008 – Price

Proposals must be submitted via GETS in the format specified in this RFP, together with the completed proposal form attached as Appendix 3. Soft copies of proposals shall be in the English language in one PDF document that is suitable for printing.

The information within the proposal shall be concise and limited to no more than twenty (20) A4 sides of minimum 10 pt font type in the non-price attribute section, including any tables and charts. A3 pages (1 A3 side) that are included in the general section will be counted as two A4 sides. Proposals with attribute information greater than the 20 sides stipulated will have only the first 20 sides evaluated. The Appendix Forms and Schedules (1-6 inclusive), Attachments, CV's, Covers and Contents pages are considered additional to the 20 sides. The Participant's attributes should be summarised in a 1 side (maximum) Executive Summary (additional to the 20 sides), which should follow the contents page but precede the following attribute descriptions;

Participants should ensure that the proposal is submitted before the closing date and time as set out in item 6 above. QLDC's policy is not to evaluate late proposals. However, QLDC does retain the right to evaluate late proposals where there is no material prejudice to other Participants.

10.3 Proposal Tags and Clarifications

The Council's preference is that the Participant's submission does not contain tags or clarifications. However, it is acknowledged that in some circumstances Participants may feel it necessary to tag or clarify their submission.

If the Participant wishes to tag or clarify their proposal in order to modify the contractual terms detailed in this RFP Document the Participant must detail that modification in the format proposed at Appendix 6. The existence of tags must be highlighted in the proposal cover letter.

Only those tags or clarifications that comply with the above and that are included in File 1 of a Participant's submission shall be considered.

Any statement that has the general effect of being a tag or clarification but is not included in the proposal tag or clarification statement may be disregarded and does not take precedence over the requirements of this RFP document.

QLDC is not required to accept any tag or clarification and Participants may be required to modify or remove any or all tags or clarifications at the QLDC's. Failure to remove a tag or clarification on request may result in that proposal being deemed non-conforming.

A premium may be added to any proposal in the evaluation process in respect of an accepted tag or clarification that QLDC considers to alter the risks, benefits or cost of the project.

11. Communication between QLDC and Participants

Requests for clarification should be sought via email to procurement@qldc.govt.nz

All queries will be responded to via GETS. Telephone enquiries will not be accepted.

Requests for clarification shall be submitted by the time and date specified in section 6 above. Requests for clarification received after this date and time will not be answered.

The answers to any questions will typically be made in writing, via the GETS communications protocol. In some circumstances, QLDC may seek further clarification prior to issuing answers, and it may decline to respond to any questions which it considers to be inappropriate.

All communications with QLDC concerning this proposal or further information must be conducted through QLDC's authorised representative:

Authorised representative: Katherine Durman
Physical Address: 10 Gorge Rd, Queenstown

Participants must not approach any of QLDC's other employees, agents, officers, consultants or advisors directly during the submission process.

12. Additional information and clarification

The RFP documentation is for the purpose of guidance and bidding only. Subject to the documentation that may ultimately form the contract between QLDC and a successful Participant, such documentation and any other document containing information or minuted discussions in relation to any aspect of a proposal or the Contract Works shall not form part of any contract subsequently concluded between QLDC and the Participant, nor be used in interpreting or construing any such contract, and neither QLDC nor its agents shall be responsible in any manner for any representation or information contained in them.

Participants should check the pages of all documents against page numbers given in indexes and summaries. In the event of any discrepancy or if for any reason, Participants are in doubt about the meaning of anything contained in the RFP documents; they should seek clarification from the QLDC representative within the time and date specified in section 6 above. Requests for clarification or additional information received after this date and time may not be answered.

If Participants are of the opinion that a request for clarification is confidential to their proposal, they may request that the clarification should not be copied to other Participants. The QLDC representative will reasonably consider any such request, but if they form the view that the request, and the resulting clarification, is not properly confidential, they may require the Participant concerned to either withdraw the request or acknowledge that the resulting clarification may be copied to other Participants.

Where, as a result of any request for clarification, confidential or otherwise, the QLDC representative forms the view that there is or may be an ambiguity or inconsistency in the RFP documents or a misunderstanding in relation to the process, they may at any time issue such clarifications or directions to all Participants as she feels are appropriate.

Participants are advised that further instructions to Participants, clarifications and amendments may be issued via the GETS system.

Except for any such written clarification issued through the GETS system by the QLDC representative which is expressly stated to be by way of an amendment to the RFP documents and for any other

document issued by QLDC which is similarly described, no written or verbal communication, representation or explanation by any employee of QLDC or its officers, consultants, advisors or agents shall be binding on QLDC or shall be taken to bind or fetter QLDC or QLDC's Representative under the Wanaka and Frankton Masterplan Service Contract.

Participants should note that there may be aspects of their proposal that will necessitate discussion and clarification. It is intended that any aspect of any amendments or clarifications which are to have contractual effect will be incorporated into the Wanaka and Frankton Masterplan Service Contract either:

- by way of amendment to the proposed contract, to be prepared on behalf of QLDC and agreed in writing by QLDC and the Participant prior to and conditional upon acceptance of the proposal; or
- by the Participant submitting, at the written request of QLDC, documents which are expressly stated to form part of the proposal.

In the event that QLDC wishes to amend, vary or supplement any of the RFP documents after submission of the proposals, QLDC will inform the Participants of the proposed changes and seek their written acknowledgement of them and confirmation that the proposal remains open for acceptance on the revised basis. Participants may identify where the amendment would affect (either increasing or reducing) the price as submitted. Upon receipt of such written acknowledgement and confirmation, the amendment shall be incorporated in the relevant documents as if it had been made prior to submission of the proposal.

In the absence of an explanatory notice, a proposal may be submitted subject to any reasonable interpretation of any ambiguity or uncertainty in the RFP documents, provided that the interpretation is expressly stated in the proposal.

13. Proposal validity period

Every proposal will be a continuing unconditional and irrevocable offer expiring on the date that is six months after the closing date as set out in item 6 above or such later date as QLDC may agree with Participants. The Participant may not alter or revoke the offer during such period, except only to the extent agreed in writing by QLDC.

14. Pricing and GST

Prices proposed should be exclusive of New Zealand Goods and Services Tax (GST) and in New Zealand dollars.

15. Information required in proposals

Section E of this RFT sets out the specific information QLDC requires in the Tender.

The following appendices must be completed and returned along with the Section E responses.

- Appendix 2 Conflict of Interest declaration
- Appendix 3 Tender Form
- Appendix 4 Proposed Contract
- Appendix 5 Pricing Schedule
- Appendix 6 Tender Tags and Assumptions

In addition to the above, each Tenderer must include their financial capacity statement (as outlined in Section E).

As mentioned above and for the avoidance of doubt, each Tenderer must also submit the completed Tender Tag or Clarification form as part of its Tender. No tags will be accepted if they are not detailed in the Tender Tag or Clarification form.

Section C - RFP Conditions

16. Rights reserved by QLDC

In addition to any other right described in the RFP, and notwithstanding anything to the contrary, QLDC reserves the right at its sole discretion and at any time to:

- reject all or any proposals;
- call and/or re-advertise for proposal(s);
- waive any irregularities or informalities in the RFP process;
- amend the closing date, the acceptance date, or any other date in the RFP documents;
- amend this RFP and any associated documents, by the issue of a written notice;
- seek clarification or further information of any proposal(s);
- suspend, cancel or terminate (in whole or in part) this RFP process;
- require any of the Participants to resubmit proposals or any document forming part of them on a revised basis;
- consider, accept or reject any non-conforming proposal or any alternative proposal;
- consider, accept or reject any proposal (whether or not it conforms or has been submitted in accordance with this RFP), including any late proposal;
- deal separately with any of the divisible elements of any proposal,
- accept or reject elements of a proposal and negotiate with the lead consultant to work with alternative consultants.
- meet with any Participant(s) before and/or after the RFP closes and prior to award of any contract;
- conclude or abandon the RFP process without negotiating or awarding any contracts.

QLDC shall have no liability to any person or entity if it exercises one or more of the above rights.

QLDC will not be bound to give any reasons for decisions made as a result of this RFP or as an outcome of the RFP process including any rejection, failure or otherwise of any Participant or proposal or any suspension or cancellation of the RFP process.

17. Alternative proposals

QLDC will not consider Alternative Proposals for this contract.

18. Canvassing

Any attempt made by a Participant to influence the outcome of the RFP process by canvassing, lobbying or otherwise seeking support of officers or representatives of QLDC, shall be deemed valid grounds for the exclusion of that Participant's proposal from the evaluation process.

By submission of proposals, Participants acknowledge that they have not and shall not engage in any practices that gives one Participant an improper advantage over another, and/or engage in any unfair and unethical practices, in particular any collusion, secret commissions or such other improper practices.

19. Investigation

Participants must examine this RFP and make all other investigations considered necessary (including with regard to information provided by QLDC in relation to this RFP) before submitting their proposal.

20. No QLDC warranties or representations

All information provided by QLDC in relation to this RFP is released on the following basis:

- such information provides a background only;
- QLDC makes no representation or warranty other than as expressly set out in this RFP document;
- Participants rely on all information provided by QLDC at their own risk; and

- the information will not form part of any subsequent contract documents other than as specified in the proposed contract.

Participants will be responsible for verifying the accuracy and adequacy of information supplied by or on behalf of QLDC.

21. No breach of IP or confidentiality restrictions

Each Participant also warrants that the information provided to QLDC, and the use of it by QLDC for the evaluation of proposals and for the negotiation of any resulting contract, will not breach any third party intellectual property rights or any confidentiality restrictions.

22. Errors and omissions

QLDC is under no obligation to check any proposal for errors. Acceptance of a proposal that contains errors will not invalidate any contract that may be negotiated on the basis of that proposal.

If the proposal contains any arithmetic error such as to vary the proposed price, and QLDC or its agent becomes aware of the error prior to acceptance of any proposal, then QLDC shall draw the error to the attention of the Participant whose proposal contains the error. QLDC shall invite the Participant to confirm that its proposal remains open for acceptance at the proposed price notwithstanding the error. Unless the Participant so confirms its proposal it shall be deemed to be withdrawn. However, QLDC, at its sole discretion, shall have the right to permit the correction by the Participant of the error (whether by alteration of the rates/prices or of the proposed price).

23. Verification and credit check by QLDC

The Participant confirms to QLDC, on its behalf and on behalf of each individual Participant's personnel referred to in the proposal, that QLDC is authorised to verify with any other person or entity any information included in the proposal or disclosed to QLDC in connection with their proposal (whether that information relates to such personnel or otherwise).

QLDC is not obliged to contact referees provided by the submitter and may seek further information on any issue from sources other than the referees provided, including the execution of a credit check. QLDC may also take into account knowledge it already has regarding submitters or their personnel.

The Participants agree that all information collected or used by QLDC under this clause will be confidential to QLDC.

24. Confidentiality

The information supplied by QLDC (either itself or through its consultants or advisors) in connection with this RFP or any contract that may arise out of it, is confidential. Participants must not release or disclose any of the information to any other person (other than its employees or advisors) without the prior written consent of QLDC.

Before releasing any confidential or commercially sensitive information to a Participant, QLDC may require the Participant (and employees, advisors, subcontractors or agents of the Participant, as appropriate) to sign a confidentiality agreement.

No advertisement or other information relating to this RFP process or any contract that may arise out of it shall be published in any newspaper, magazine, journal or other advertising medium, or broadcast/disseminated by radio, television or other electronic media by a Participant without the prior written approval of QLDC.

25. Proposal costs

All costs incurred by the Participant in connection with its proposal are the sole responsibility of the Participant, including but not limited to costs arising from:

- preparation of the proposal;

- any communication and/or negotiation with QLDC;
- any meetings, interviews or presentations with QLDC; and
- any site inspections.

26. Ownership/return of proposals

The RFP documents are the property of QLDC and may not be copied or reproduced in any way (other than for the purposes of preparing and submitting your proposal) without the prior written approval of QLDC.

The proposal submitted to QLDC in response to this RFP shall be retained by QLDC.

27. Governing law

This RFP is governed by New Zealand law. New Zealand courts have non-exclusive jurisdiction as to all matters relating to this RFP.

28. Liability limitation

QLDC, its agents and advisors will not be liable in contract or tort or in any other way whatsoever for any direct or indirect damage, loss or cost incurred by any Participant or any other person or entity in respect of this RFP process, its conduct or its outcome.

To the extent that, notwithstanding any other provision in this RFP, QLDC, its agents and/ or its advisors are found to have any liability to a Participant in respect of the RFP, on whatever basis, then such liability is, in all circumstances whatsoever, capped at \$1.00.

29. Status of RFP / no binding legal relations

This RFP is based on common law and is an invitation to treat. Accordingly, the issuance of this RFP (and any other information in relation to or in connection with this RFP) does not constitute an offer by QLDC that is capable of acceptance by any Participant.

Each Participant, by submitting their proposal, acknowledges and agrees that:

- (a) their proposal is an offer that QLDC may accept or negotiate in the manner contemplated in the RFP;
- (b) any such negotiations do not and will not result in QLDC incurring any obligation or liability whatsoever to the Participant; and
- (c) no obligations or liability whatsoever will arise between QLDC and any Participant in relation to or in connection with this RFP, including, without limitation, in relation to or in connection with the conduct, process or outcome of this proposal process, except to the extent to which a Participant and QLDC have entered into a signed agreement to perform the Contract Works.

30. Conflict of interest

A declaration of no potential, perceived or actual conflicts of interest must be provided with each proposal as per the form set out in Appendix 2. Any potential, perceived or actual conflict or any undeclared conflict of interest may result in the Participant's immediate exclusion from participation in the RFP process including rejection of their proposal.

Section D - Evaluation and Acceptance

31. Supplier Selection Method

Proposals will be assessed against the requirements set out in this RFP by QLDC at its sole discretion.

Proposals will be evaluated in accordance with the "Price Quality Method" as documented within Appendix C (Page C-5) of the NZTA Procurement Manual, Steps 1 to 6 inclusive. Please refer to the NZTA website <http://www.nzta.govt.nz/resources/procurement-manual/index.html> for full details of these methods.

Weightings will be given to each of the attributes as follows:

Relevant Experience & Track Record	20%
Relevant Skills	30%
Methodology	30%
Price	20%

32. Evaluation process

Proposals received for this contract will be evaluated in a clear and consistent manner with the entire process being documented.

Each proposal will be evaluated by an Evaluation Team as to the capability of the Participant and strengths of the proposal, and the confidence the Evaluation Team has that the Participant will deliver the capability and competencies presented. The Evaluation Team will consist of selected representatives of QLDC with expertise and skills to ensure an objective evaluation is achieved.

1. The Evaluation Team will complete their individual evaluation of the contents of each "Envelope No 1 - Proposal, excluding Price" and then meet and reach preliminary agreement on the evaluation of the non-price attribute score for each proposal.
2. The RFP non-price attributes will be evaluated in two stages. The first stage will include evaluating the non-price attributes to establish a shortlist of (up to three) Participants to make a presentation of their proposal methodology. The second stage will include evaluating the presentations and then finalising the scores for the non-price attributes.
3. Shortlisted participants will be advised of their shortlisted status on 08 October 2018 if they are required to make a presentation to the Evaluation Team (in person or via videoconference) on the morning of 10 October 2018 as part of the overall evaluation process. If required, the presentation and time for questions from the Evaluation Team will be around 30 - 45min.
4. Where a proposal does not meet the minimum standard required of this RFP or a grade of 35 or less is awarded for any non-price attribute the proposal will be deemed non-conforming and no further evaluation will take place.
5. Documented proposal clarification may be sought from Participants during the evaluation and recorded for evaluation purposes.
6. The final scores will be submitted to the QLDC authorised manager for approval to open the price envelopes for all proposals.
7. The Base Estimate (for Wanaka only) to be used in the tender evaluation will be \$541,000. If the Tenderers have any concerns regarding the accuracy of the estimate, Tenderers are able to submit their concerns up to 4.00 p.m., 5 working days prior to tender close, through the following process:
 - Tenderers shall forward their comments on the accuracy of the estimate directly to the Probity Auditor nominated in this RFT.

- The Probity Auditor shall pass the comments (without revealing the Tenderer's identity) to the QLDC General Manager – Property & Infrastructure.
- 8. The QLDC General Manager – Property & Infrastructure will consider the information and, if deemed necessary, advise the Client to issue further instructions to Tenderers before tenders close. The Client shall not reveal any price sensitive information to the TET.
- 9. Following opening of "File 2 - Price" of all proposals and identification of the two Participants with the lowest adjusted evaluation price, a pre-letting meeting may be held with the participants who submitted these preferred proposals
- 10. Final acceptance of a proposal will be made following submission of a report and recommendation to QLDC's General Manager – Property & Infrastructure.

32.1 Past experience

QLDC may also include in its evaluation of a proposal its past experience with the Participant. This may include whether the Participant has met all contractual requirements that they have had with QLDC, for example the Participant's previous service delivery record when providing services, their ability to promptly identify and resolve issues, provide timely and accurate information.

32.2 Third party information requests

QLDC reserves the right to request information from any company, organisation or person it considers relevant in the course of evaluating this proposal.

33. Communication of decision

The QLDC authorised representative will notify Participants of the decision resulting from the evaluation of proposals in writing. Only the names of the Participants, the successful Participant's name & price and the range of scores of the other Participants will be disclosed after the contract is awarded. There will be no post-proposal debriefings with unsuccessful Participants.

All notices will be forwarded to the address and or email provided by each Participant in its proposal.

34. Post Evaluation Contract Allocation Process

QLDC will then hold an initial joint inception meeting with the two successful Participants. This meeting will allocate the two contracts between the two parties. The indicative process for the allocation for the two contracts will include:

1. Assessment during the RFP Evaluation process
2. Discussion with successful proponents

The final allocation of the two contracts between the two successful Participants remains with QLDC. It is acknowledged that the team nominated by QLDC to undertake the Frankton contract will need to submit a formal price for this project (as only Wanaka is being priced within the tender proposal), after they have been identified as the Preferred Frankton tenderer. It is the expectation of QLDC that the Frankton scope of works is of a similar magnitude to that of Wanaka as the base estimate is similar at \$536,000 (this base estimate will not be used in the evaluation of this tender).

35. Preferred Participants

QLDC is not obliged to negotiate with any Participant selected as a preferred Participant resulting from this RFP process.

Should QLDC advise a Participant that they are a preferred Participant such advice does not:

-
- constitute an acceptance of that Participant's proposal by QLDC, or create a contract; or
 - constitute an award of the contract to that Participant; or
 - imply or create any obligation on QLDC to enter into negotiations with that Participant or award the contract to that Participant.

QLDC may discontinue any negotiations with any Participant(s) at any time.

36. Probity

An independent probity auditor has been appointed to overview the RFP process (up to contract award) and verify that the procedures set out in the RFP documents are complied with. The probity auditor is not a member of the Evaluation Team.

A Participant concerned about any procedural issue has the right to contact the probity auditor and request a review. The outcome of any such review will be documented with copies sent to both the respondent who raised the issue and to the Principal. The name and contact details of the probity auditor are as follows:

Shaun McHale
McHale Group
Level 1, 187 Featherston Street
PO Box 25103
Wellington 6146
Phone: (04) 496 5580

Shaun.mchale@mchalegroup.co.nz

Section E - Information Required from Participants

37. Description of Attributes

This shall be a concise statement detailing the information requested in the following sections and such other submissions as the Consultant considers necessary for the proper evaluation of the Proposal. Proposals will be evaluated on the appropriateness and quality of attribute information provided and not its volume. To provide a fair basis for evaluation and comparison, the information shall be concise and limited to no more than twenty (20) A4 sides of minimum 10 pt font type in the non-price attribute section, including any tables and charts. A3 pages (1 A3 side) that are included in the general section will be counted as two A4 sides. Proposals with attribute information greater than the 20 sides stipulated will have only the first 20 sides evaluated. The Appendix Forms and Schedules (1-6 inclusive), Attachments, CV's, Covers and Contents pages are considered additional to the 20 sides. The Participant's attributes should be summarised in a 1 side (maximum) Executive Summary (additional to the 20 sides), which should follow the contents page but precede the following attribute descriptions;

Any partial compliance or non-compliance with requirements must be clearly described in the response and set out in the Statement of Departures.

38. Relevant Experience & Track Record (20% weighting)

Basic Definition: The Participant's previous experience in delivering the services relevant to the project and record of completing commissions to the quality standards required, on time, and within budget.

The combined relevant experience and track record should be described in tabular form and include the following:

- The similarity and relevance of three projects completed over the last five years clearly indicating the Participant's roles in relation to Masterplanning and ITPBC projects.
- The role that key personnel proposed for this project, undertook in these previous projects and details of their relevant experience contributing to the success of the projects and why they are relevant to this project.
- Name of the project and name and type of professional services.
- Time of the project (start and completion dates of the projects and relevant stages).
- Client (includes the name and telephone number of a contact person).
- Value of the project as well and the participants contract value of the overall project.
- Completed on time (include comments for clarification).
- Completed within agreed budget (include comments for clarification).

Sub Attributes

Amongst the sub attributes to be evaluated will be the, Relevant Experience; Local Experience and Knowledge; National Experience and Knowledge; Relevant awards. Each will be examined for relevance, currency, scale and track record.

QLDC reserves the right to undertake a detailed, but confidential, review of the financial status of each Participant.

39. Relevant Skills (30% weighting)

Basic Definition: The competence, relevance and availability of the personnel the Participant proposes to use for the Project, with particular regard to their skills and experience in the technical and management areas comparable to the project.

The Tenderer shall nominate the Project Leader and key personnel to be utilised and available for the execution of the work, stating their name, position proposed, qualifications, training, technical and

management skills, length of experience and listing their areas of expertise and responsibility (focus) relevant to the position nominated in this project along with their achievements and contributions to the Relevant Projects nominated.

The focus of each Key Personnel is also required to be provided.

Key Personnel to be marked for this criteria is as follows:

Key Personnel	Weighting for marks
Team Leader	20%
Business Case Author	15%
Urban Design Masterplanner	30%
Transport Planner	20%
Comms and Engagement	15%

A Curriculum Vitae (CV) for each person should show details and dates for specific appointments, experience and relevant qualifications. CVs are to be limited to 2 sides maximum, for each key person offered in the proposal. CVs do not contribute to the 20-page general section limit.

40. Methodology (30% weighting)

Basic Definition: *The procedures and methods the Participant proposes to use to achieve the specified end result.*

Under this attribute, the Participants are expected to demonstrate their understanding of the nature of the project and the client's needs, and the means and methods whereby the desired results can be achieved in a practicable and efficient manner. The methodology and price offered should be complementary i.e. the conforming methodology proposed should be achievable for the price offered.

The Participant should provide a narrative description of the methods proposed to be used in relation to the draft programme. This may include reference to such items as:

- | | |
|--|-----|
| (i) Overall approach to developing a Master plan and ITPBC in parallel, including process for outcomes confirmation and option development | 30% |
| (ii) Understanding of Wanaka context and considerations | 20% |
| (iii) Understanding of Frankton context and considerations | 20% |
| (iv) Approach to engagement through the process, including who, when and how | 15% |
| (v) Proposed programme, risks and project management aspects of contracts | 15% |

41. Presentation (no weighting)

A 30 minute presentation (either in person or via videoconference) may be required from shortlisted Participants. During this presentation, the Participants should further describe and explain their methodology/design process as it relates to:

- Collaboration and integration across the team members and the various projects
- Delivering within the tight programme
- Initial thoughts on the issue of the significant growth of traffic and the conflicts that exist over movement, sense of place and aspirations of a highly walkable town centre.

42. Price (20% weighting)

The Participant is required to submit indicative pricing and hourly rates for the following components of the project (as per the Indicative Pricing Schedule in Appendix 5):

This indicative pricing should be an estimate of the cost related to the scope of works identified in this RFP. A price is only required for the Wanaka works as part of this RFP.

The Indicative Pricing Schedule must be submitted within File No.2: Price.

All pricing is to be fully inclusive of the Participant's costs but **exclusive** of GST.

43. Tender Evaluation Forms

The following Tender Evaluation Forms will be used in the evaluation of tender non-price attributes:

- Form A: Relevant Experience and Track Record
- Form B: Relevant Skills
- Form C: Methodology.

Sub-attribute weightings for the criteria to be assessed in the evaluation of the non-price attributes shall be stated on the forms at the time of tender. If no sub-attribute weightings are shown, the assessment criteria will be evaluated as having equal weightings.

Relevant Experience & Track Record (Weighting 20%)				Form A
Relevant Experience (Weighting 10%)			Track Record (Weighting 10%)	
Project	Relevance (70%)	Currency (20%) (Years ago or % complete)	Scale (10%) (% of Estimate)	Performance – Standard (100%)
	35 or less: Not related 40, 45: Barely related 50, 55: related 60, 65, 70: Particularly related 75, 80, 85: Very related 90, 95, 100: Extremely related	35 or less: 5+ years or < 50% complete 40, 45: 4–5 years or 50-60% complete 50, 55: 3-4 years or 60-70% complete 60, 65, 70: 2-3 years or 70-80% complete 75, 80, 85: 1-2 years or 80-90% complete 90, 95, 100: 0-1 years or 90-99% complete	35 or less: <35% of estimate 40, 45: 35-50% of Estimate 50, 55: 50-70% of Estimate 60, 65, 70: 70-90% of Estimate 75, 80, 85: 90-100% of Estimate 90, 95, 100: > or = Estimate	35 or less: Unsatisfactory 36- to 49: Needs Improvement 50- to 59: Acceptable 60 to 70: Requirements fully met 71 to 85: Exceeds Requirements 86 to 100: Superlative
Summary	Rating:			
Tenderer:	Relevant Experience Rating:			
	Track Record Rating:			

Evaluators Comments (Continue on Separate Sheet if Necessary)

Note to TET:

- Relevant experience relates to company not individuals;
- Company permanence and commonality of personnel with those nominated in RS are of greater relevance;
- Relevant experience should include relevant experience of key sub-consultants if appropriate;
- Recent experience is more valuable than historic experience (for uncommon or unusual projects older than p5 years, currency is to be assessed more moderately); and
- Can the Tenderer readily adapt existing experience to the type of work being tendered for?
- Track Record relates to company, not individuals, and should include track record of key sub-consultants;
- Where the relevant phase is incomplete or more than 5 years old, the TET may consider downgrading the Project.

Relevant Skills (Weighting 30%)		Form B		
Personnel		Qualifications and Training (20%)	Practical Experience (70%)	Focus (10%)
		35 or less: Barely adequate 40, 45: Adequate 50, 55: Meets requirements 60, 65, 70: Related 75, 80, 85: Very Related 90, 95, 100: Directly Applicable	35 or less: Poor 40, 45: Below Average 50, 55: Average 60, 65, 70: Above Average 75, 80, 85: Good 90, 95, 100: Excellent	35 or less: Poor 40, 45: Below Average 50, 55: Average 60, 65, 70: Above Average 75, 80, 85: Good 90, 95, 100: Excellent
Team Leader	20%			
Business Case Author	15%			
Lead Masterplanner	20%			
Urban Designer	15%			
Transport Planner	15%			
Comms and Engagement	15%			
Summary	Rating:			
Tenderer:		Relevant Skills Rating:		

Evaluators Comments: (Continue on Separate Sheet if Necessary)

Note to TET:

- Relevant Skills relates to individuals not company, and should include relevant skills of key sub-consultants, if the positions listed are to be filled by sub-consultants.

Position	Typical Qualifications	Skill Description
Team Leader	BE (or equivalent), CPEng and management training / qualifications	Considered the face of the project for the Consultant. Responsible for the leadership of the project
Business Case Author	Bachelors degree or equivalent	Responsible for the writing and bringing together of the business case and investment story
Lead Masterplanner	Bachelors degree or equivalent	Responsible for the leadership and development of the masterplan elements of the contract
Urban Designer	Bachelors degree or equivalent	Responsible for the development of the urban design elements of the contract
Transport Planner	Bachelors degree or equivalent	Responsible for the transport planning and transport option development and assessment
Comms and Engagement	Bachelors degree or equivalent, IAP2 Accreditation	Responsible for the development of the stakeholder and communication elements of the project

Methodology (Weighting 30%)		Form C
Factor		Standard (100%)
		35 or less: Poor 40, 45: Below Average 50, 55: Average 60, 65, 70: Above Average 75, 80, 85: Good 90, 95, 100: Excellent
Overall approach to developing a Master plan and ITPBC in parallel, including process for outcomes confirmation and option development	30%	
Understanding of Wanaka context and considerations	20%	
Understanding of Frankton context and considerations	20%	
Approach to engagement through the process, including who, when and how	15%	
Proposed programme, risks and project management aspects of contracts	15%	
Summary Rating:		
Tenderer:		Methodology Rating:

Evaluators Comments: (Continue on Separate Sheet if Necessary)

Note to TET:

- Methodology relates to the proposed method of carrying out the professional services, and should include methodology and company systems of key sub-consultants if services are to be carried out by sub-consultants;
- Company systems marked are those specifically proposed and adapted to meet the needs of this project, not those used on previous contracts;
- This attribute also evaluates procedures the Tenderer proposes to use to achieve the specified end result; and
- TET should consider the following when evaluating methodology:
 Does the submission focus on this project?
 Is the methodology appropriate?

Section F – Contract Scope

44. Specific Scope of Services

44.1 Professional Services Required:

This RFP covers the provision of Design Services from a multi-disciplinary team of consultants for the Wanaka and Frankton Integrated Masterplan and Transport PBCs. There will be two lead consultant /organisations engaged for this project who will provide the various personnel with the required masterplanning, urban design, business case and traffic and transport skills and experience.

44.2 Liaison

The Consultant's nominated Project Manager shall liaise in person or as agreed with the QDLC Project Manager during the course of the Project and shall attend all regular project meetings and other forums nominated or agreed. The Consultant shall liaise with all other stakeholders as required to provide the Services.

44.3 Management and Consultation

A project team will be established so there is one core group accountable for delivering the project outcomes. This will consist of internal officers and lead consultants. It is anticipated that this group will meet regularly throughout the duration of the project.

44.4 Specific Services – Services Scope

The following scope of services is a preliminary scope which will require further review and refinement once the successful consultant is engaged. This scope is provided to assist the Participant in preparing indicative pricing for the different components of the contract.

The successful Consultant team will be required to, amongst other duties:

- Provide urban design masterplanning, transport engineering, investigation of long list and shortlist options and concept design services.
- Liaise with the QLDC Project Manager
- Provide communications for the project, including meetings, liaison, phone, email, reporting, minutes, records, presentations etc.
- Collaborate with all design and non-design technical resources.

The scope of the Spatial Framework and Public Realm Urban Design services includes:

- Receipt and review of all relevant background information and reports
- Facilitation of the Masterplan 'Vision' Workshop and preparation of a summary of background information and initial thoughts to assist with the workshop to be undertaken with Councillors and relevant stakeholders.
- Design collaboration with the other project disciplines with emphasis on the public realm, public-private interface and multi-modal transport integration.
- Liaison with key interest groups and review teams.
- Presentations to Council and key stakeholders.
- Preparation and presentation of the draft and final masterplan (incl. design visuals and 3D renderings to portray the key moves and project 'look and feel' components), for review and approval. Include for amending and reissuing as necessary.
- Preparation of a comprehensive Town Centre Masterplan Spatial Framework document, including Public Realm Design Guidelines.

The scope of services of the Integrated Transport PBC includes:

- Delivering an ITPBC that is approved by QLDC and the Transport Agency, meaning the business case requirements of these two parties is to be understood and the process compliant with each organisation's needs. The Business case is to meet the requirements of the Transport Agency procedures as outlined in the attached link:
<https://www.nzta.govt.nz/planning-and-investment/learning-and-resources/business-case-approach-guidance/supporting-material/tools-and-templates/> This will include, but not be limited to:
 - Costings for all options
 - Economic Evaluation
 - Environmental Assessment
 - Multi-criteria assessment of options
 - Stakeholder and Public Engagement
 - Implementation strategies, including Consenting and Property
- Contract Management services including:
 - Contract Management
 - Project Quality Plan (including cashflow)
 - Financial management
 - Monthly reports
 - Programme management
 - Development and maintenance of risk register

Appendix 1 - Acknowledgement Form**Request for Proposal
(RFP)****for the provision of****QLDC Contract CT19-008 Wanaka and Frankton Masterplan
Services**

1. We acknowledge receipt of your RFP with Contract Number CT19-008
2. We acknowledge and agree to conform to the RFP process and accept the basis upon which QLDC is undertaking the RFP process as set out in the RFP.
3. We nominate the following person to communicate with QLDC on our behalf in relation to the RFP process and our response:

Name of Person(s):**Position of Person(s):****Firm:****Address:****Telephone Number:****Email:**

4. We agree to comply with Section C, clause 21 (Confidentiality) of the RFP, in addition to any other obligation of confidentiality we have with QLDC:

**Duly signed for and on behalf
of:**

Authorised signatory

Name of Company and authorised signatory

Please return a signed scanned copy of this acknowledgement form to procurement@qldc.govt.nz to enable access to the RFP reference documents.

Appendix 3 – Proposal Form

Proposal for:	Wanaka and Frankton Masterplan Services (the Contract Works)
Contract number:	CT19-008

Participant’s unconditional and irrevocable acknowledgment, agreement and declaration

1. Having examined the RFP documents for the above Contract Works, we offer to carry out the Contract Works in full conformity with the RFP documents, including the proposal contract annexed to the RFP, Tags and Assumptions accompanying this proposal, for the amounts set out in the accompanying pricing documentation that may become payable under the proposed contract.
3. This proposal is valid and remains open for acceptance by QLDC for the period stated at Section B of the RFP.
4. The Participant has read and fully understands the RFP, including, without limitation, clauses 13 (Rights reserved by QLDC), 20 (Verification and credit check by QLDC), 25 (Liability limitation), 26 (Status of RFP / No binding legal relations), and agrees to be bound by the same in full.
6. We confirm the warranty set out in Section C, clause 19 (No breach of IP or confidentiality restrictions) of the RFP and agree to comply with Section C, clause 21 (Confidentiality) of the RFP, in addition to any other obligations of confidentiality we have with QLDC.
7. In preparing its proposal, the Participant:
 - has provided complete and accurate information in all parts of the proposal in all material respects
 - has secured all appropriate authorisations to submit its proposal and is not aware of any impediments as to its ability to enter into a contract to deliver the Contract Works.

The Participant understands that should it be successful in being awarded a contract with QLDC, that the falsification of information, the supply of misleading information or the suppression of material information in relation to this proposal will be grounds for termination of the contract by QLDC.

8. We agree to work under the QLDC CCCS Specific and Special Conditions.
9. We understand that no payment will be made until both parties sign the CCCS and if successful we will sign without delay.
10. We attach the information to be submitted with this proposal.
11. Notice to Participants
 We acknowledge receipt of Notice to Participants Numbers.....and confirm that the pricing submitted includes full allowance for these notices.

Name of Participant	
Duly signed by an authorised signatory of the Participant	
Name and title of authorised signatory	
Date	

Appendix 4 – Proposed Contract**CCCS Specific and Special Conditions of Contract**

Draft CCCS attached

Appendix 5 – Indicative Pricing Schedule & Basis of Payment

1.0 SUMMARY PROPOSAL PRICE SCHEDULE

Activity/Deliverable/Service	Unit	Amount \$	Total Hrs
1. <u>Management</u>			
1.1 Management of contract	LS		
1.2 Project meetings	LS		
1.3 Project Quality Plan	LS		
2. <u>Masterplan Development (Wanaka)</u>			
2.1 Overarching Masterplan document	LS		
2.2 Spatial Framework document (incl. implementation plan)	LS		
2.4 Public Realm Design Guidelines	LS		
3. <u>Programme Business Case (Wanaka)</u>			
3.1 Part A – The Strategic Case	LS		
3.2 Part B – Option Development/Recommended Project Option; and	LS		
3.3 Part C – Delivering and Monitoring the Programme.	LS		
3.4 Final Business Case	LS		
3.5 Consultation and Engagement (covering both the Masterplan and PBC)	LS		
4. <u>Disbursements</u>			
4.1 Allowance for all disbursements incl. travel & accommodation costs	LS		
TOTAL 1-4	LS	\$	
5. <u>Additional Services</u>			
5.1 From additional services schedule	LS	\$	N/A
TOTAL 1-6		\$	

2.0 Additional Services Schedule

Tenderers shall complete the Additional Services Schedule and submit with their tender to provide unit rates for any variations to the Contract Scope that may be agreed with the Client.

Additional services may be broken down into personnel, computing time and vehicle running for the project. Each item has been assigned an arbitrary number of hours or kilometres for which the Tenderer shall provide rates. These rates shall apply for any Additional Services or Provisional Sum items of work, irrespective of the number of hours estimated in the Schedule below. The total amount arrived at shall be transferred to the Contract Pricing Schedule.

"Other Personnel" may be grouped into similar occupational groupings (e.g. Overseers, Designers, Accounts Officers, etc.), and an average Hourly Rate for each grouping specified.

Item	Description	Unit	Hours	Rate
5.1	Team Leader	Hours	50	
5.2	Business Case Author	Hours	50	
5.3	Lead Masterplanner	Hours	50	
5.4	Urban Designer	Hours	50	
5.5	Transport Planner	Hours	50	
5.6	Comms and Engagement	Hours	50	
5.7	Mileage	km	100	

Other Personnel (Tenderer to Nominate, Provide Rate Only):

5.8	[Other]	Hours		
5.9	[Other]	Hours		
5.10	[Other]	Hours		

2.0 BUDGET

An overall budget of \$541,000 is the base estimate upon which this tender is to be evaluated. It is noted that this relates to the subsequent Wanaka contract only. QLDC consider that the Frankton scope of works is of a similar order of cost magnitude.

3.0 BASIS OF PAYMENT

Proposal and Payment

- **All Inclusive Rates**

The Consultant's sum shall allow for all costs including, labour, travelling, documents, plans, reports, printing and all other ordinary disbursements and associated costs, and shall be submitted on the Summary Proposal Price Schedule attached, as part of the rate. The Consultant should identify extraordinary disbursements and costs if they arise following Contract Award for prior approval and for separate payment.

It is the Consultant's responsibility in preparing the Proposal Price, to provide and allow for within the Summary Proposal Price Schedule **somewhere**, all of the costs they require reimbursement for, in preparing the complete outputs and deliverables described herein.

The Consultant's Price should allow for **all** Consultant time requirements for the programme period (identified in Attachment 2) and any extensions of time requested and granted beyond that, for those activities.

- **Variations**

The Client reserves the right, without prejudice, to withdraw (without additional payment), vary, or discontinue any part or this entire contract at any time. This is likely to be (but not limited to), as a result of; the ability of the Client to fund a project; or the elimination or reduced need for the services or activity; or due to the Consultant's poor performance. No claims from the Consultant shall be considered by the Client, due to the cancellation of any phase of the Project. In the event of cancellation, the Consultant shall supply all deliverables required up to the cancellation.

- **Instructions to Proceed**

Items that are ultimately to be paid for per each item or by Hourly rates shall only proceed or be expended following instruction or confirmation by the Client's Representative.

- **Claims**

Claims for payments for professional services will be submitted monthly, no later than the 10th of each month, and is to detail; tender amounts, previous total, amounts claimed each period and total amounts claimed to date. Invoices will be paid on the 20th of the month. All claims are to be consistent with cashflow projects in the PQP and agreed with client prior to invoices being formally submitted.

Appendix 6 – Proposal Tags and Assumptions

Note: This form must accompany each proposal submitted.

Proposal for:	Wanaka and Frankton Masterplan Services Contract
Contract number:	CT19-008

We declare that our proposal is based on and in full conformance with the RFP documents, including the proposed contract annexed to the RFP, subject only to the following clarifications, tags and assumptions.

(Unlimited pages)

Name of Participant	
Duly signed by an authorised signatory of the Participant	
Name and title of authorised signatory	
Date	

Attachment 1 – Supporting Documentation

1. Wanaka Establishment Report
<https://www.qldc.govt.nz/assets/Uploads/Your-Council/Projects/Wanaka-Masterplan-2018/Wanaka-Establishment-Final-Rev-B.pdf>
2. Wanaka Strategic Case
<https://www.qldc.govt.nz/assets/Uploads/Your-Council/Projects/Wanaka-Masterplan-2018/Wanaka-Transport-Strategic-Case.pdf>
3. Wanaka Network Operating Framework
<https://www.qldc.govt.nz/assets/Uploads/Your-Council/Projects/Wanaka-Masterplan-2018/Wanaka-Network-Operating-Framework-Report.pdf>
4. Frankton Establishment Report
<https://www.qldc.govt.nz/assets/Uploads/Your-Council/Projects/Frankton-Masterplan/Frankton-Masterplan-Establishment-Report-2.3-Final.pdf>
5. Queenstown Integrated Transport PBC
<https://www.shapingourfuture.org.nz/assets/Uploads/10a.-Attachments-Queenstown-Integrated-Transport-Strategy.pdf>
6. Queenstown Town Centre Masterplan PBC
<https://www.qldc.govt.nz/your-council/major-projects/queenstown-town-centre/masterplan-document-hub/>
7. Queenstown Town Centre Spatial Framework
<https://www.qldc.govt.nz/your-council/major-projects/queenstown-town-centre/masterplan-document-hub/>
8. Queenstown Town Centre Public Realm Design Guidelines
<https://www.qldc.govt.nz/your-council/major-projects/queenstown-town-centre/masterplan-document-hub/>