

5 February 2010

MINISTRY OF EDUCATION SCHOOL BUS SERVICES TENDER: INSTRUCTIONS TO TENDERERS

Thank you for your interest in the Ministry's tender for School Bus Services.

Overview:

The tender documentation comprises the following:

- Request for Proposal (RFP);
- Template 2 and Template 10. All other templates are at the back of the RFP;
- Draft bus operator contract;
- School Bus Route Information (available through the Multiserve website www.multiserve.co.nz);
- This document, "Instructions to Tenderers".

This document gives guidance on what to provide in your Qualification Submission; how to provide it and a check list to ensure all required information has been supplied. Templates 1 to 9, 11 and 12 need to be completed for your Qualification Submission.

Template 10 needs to be completed on a separate CD for the Operator Selection (Pricing) Submission.

The Ministry will not open the Operator Selection (Pricing) Submission unless a pass has been obtained in the Qualification Phase.

Qualification Phase Submissions:

In December 2009 the Ministry issued a tender for school bus services, that tender is still underway. Any operators who are participating in that tender, and who have provided their Qualification Phase Submission response, need not resubmit that documentation for this tender. The exception to that is the Fleet Information provided on Template 2. Operators may submit another Template 2 should they want the Ministry to consider additional vehicles. The points awarded as part of the December 2009 RFP can be transferred to this RFP. Please indicate below if you want the Ministry to use the Qualification Score from the December 2009 RFP.

Alternatively, all Qualification Phase Submission response material is to be provided on one CD, including:

- The Microsoft® Excel spreadsheet (template 2) we have supplied and which you have completed;
- The Microsoft® Word templates we have supplied with the RFP and which you have completed;
- The samples and examples of material you have been requested to supply.

Original signed or official documentation is to be scanned and put on the CD. You are required to ensure that the originals of these documents are safely stored, to be produced as requested. These are:

- QBase and ISO 9002 accreditation certificates (Template 3);
- The accountant / auditor professional attestation (Template 6);
- One or more of planned vehicle purchase or lease details (Template 9);
- NZ Transport Agency information consent form (Template 11);
- Statutory Declaration (Template 12);
- References (Template 13) - Please Note that if you want the Ministry to contact a school for a reference on your behalf, you must specifically request this and supply the school's name and contact details to the relevant Service Agent when submitting the RFP response;
- Copies of any other certificates or official documentation that you are submitting in support of your tender (e.g. a first-aid certificate).

Naming Conventions:

To assist the Ministry to readily identify all documentation in your response, can you please give any examples or attachments a meaningful file name. Some examples are:

- the sample copy of a daily check sheet requested in template 3 could have a file name of 'Template 3: daily check sheet';
- If you are sending in several examples of accreditations requested in template 4, the file name could be 'Template 4: accreditation 1', and so on;
- If you are sending in several vehicle lease details (template 9), the file name could be 'Template 9: lease 1', and so on.

Notes:

Although full instructions are available within the RFP, the following notes are designed to assist you in completing the documentation. These notes should not be read as replacing the RFP in any way.

Template 2 - Vehicle Information.

You need to submit this information on the Microsoft® Excel spreadsheet provided. This information will then be passed on to NZ Transport Agency. Please list:

- the registration numbers of vehicles you have used for school transport in the two years to 31 December 2009. Extend the spreadsheet if more rows are required.
- the registration numbers of vehicles you intend to use for school transport from 19 April 2010. Extend the spreadsheet if more rows are required.

Please don't leave any gaps in the number – i.e. ABC123 and not ABC 123.

Then save the spreadsheet to the Qualification Phase CD.

Remaining Templates

Please complete all remaining templates electronically and save them to the Qualification Phase CD.

Operator Selection (Pricing) Phase Submissions:

All Operator Selection (Pricing) Phase Submission response material is to be provided on one CD, including:

- The Microsoft® Excel spreadsheet (template 10) and which you have completed;
- This CD is to be separate from the Qualification Phase CD

Final Instructions

Use the checklist at the end of this document to ensure you have provided all of the information requested.

Put a hardcopy of the completed checklist, and the Qualification Phase CD, in a sealed envelope labelled **Qualification Phase**. Put the Pricing Phase CD in a separate sealed envelope labelled **Operator Selection Phase**. Send both sealed envelopes to the address in the Request for Proposal.

Qualification Phase and Operator Selection Phase submissions must be received by 4.00pm, 5 March 2010.

Late Qualification and Price Submissions will not be accepted.

Paper, faxed or emailed tenders will not be accepted.

If you have any questions relating to this RFP including clarifications, submission evaluation and scoring queries, complaints and other RFP issues, these are to be in writing setting out clearly the nature of the clarification or information sought, and posted or emailed, to be received no later than 4pm Friday 19 February 2010 to:

Bernadette Scannell
Contracts Co-ordinator
Resourcing Division
Ministry of Education
P O Box 1666
Wellington

Email Address: bernadette.scannell@minedu.govt.nz

MINISTRY OF EDUCATION SCHOOL BUS SERVICES REQUEST FOR PROPOSAL CHECKLIST

| Template | Title | Purpose | Checklist Tick |
|---|------------------------------|--|--------------------------|
| Qualification Phase | | | |
| <p>Either:</p> <p><i>I am participating in the School Bus RFP issued December 2009 and confirm that the points awarded from that earlier RFP are to be transferred to this RFP. No new Qualification Phase Submission is provided.</i></p> <p><i>An additional Template 2 is provided for consideration – Yes / No (please delete one)</i></p> <p><i>Please sign here:</i></p> <p>_____</p> <p>Name of Company:</p> <p>_____</p> | | | |
| <p>Or: The tenderer has provided the following:</p> | | | |
| 1 | Tenderer Identification | This tells us who you are, your insurance and PSL details, business contacts, your subcontracting relationships(if relevant), and your route map requirements. | <input type="checkbox"/> |
| 2 | Vehicle Information | You need to provide us with the registration numbers of each school transport vehicle you have used in the past two years, and those you intend to use from April 2010. | <input type="checkbox"/> |
| 3 | Vehicle Maintenance Schedule | You need to advise us how you keep your vehicles safe and roadworthy. Include <ul style="list-style-type: none"> • a sample copy of a daily check sheet • copies of QBase and ISO 9002 certificates (if appropriate). | <input type="checkbox"/> |
| 4 | Driver Development Programme | This tells us who is trained and how you will train your drivers to meet the standards in the RFP. In addition we require <ul style="list-style-type: none"> • summary of driver experience • example of recruitment and induction training offerings • example of ongoing driver development offerings • example of driver qualification, experience and training records • copies of accreditations | <input type="checkbox"/> |

| | | | |
|----|--|---|--------------------------|
| 5 | Driver Management Programme | This tells us how you manage your drivers to meet the standards in the RFP. In addition we require an example of your driver management records. | <input type="checkbox"/> |
| 6 | Accountant/Auditor Professional Attestation | You need your accountant or auditor to confirm that your business plan is viable. | <input type="checkbox"/> |
| 7 | Management Experience Schedule | This helps us judge the robustness of your business and the quality of service we can expect. | <input type="checkbox"/> |
| 8 | Business Operating Plan | You need to provide us your business plan or a summary of the relevant parts. It is important to us that your business is sustainable. | <input type="checkbox"/> |
| 9 | Planned Vehicle Purchase or Lease | You need to provide us with one copy of this template for each vehicle you plan to buy or lease | <input type="checkbox"/> |
| 11 | NZ Transport Agency Information Consent Form | This form is necessary so that Land Transport NZ can assess your vehicle information provided as part of Template 2. If this is not signed, your tender cannot be considered. | <input type="checkbox"/> |
| 12 | Statutory Declaration | This form acknowledges that all the information you have provided as part of this tender is correct and that you will be able to meet the full requirements of the contract. | <input type="checkbox"/> |

In a separate CD

| Template | Title | Purpose | Checklist Tick |
|---|------------------------|---|--------------------------|
| Operator Selection (Pricing) Phase | | | |
| 10 | Route Price Submission | This template contains a number of 'worksheets' listing the route numbers, you will be able to enter the per/km breakdown for every route being tendered for. | <input type="checkbox"/> |

Please forward all required documentation to:

Graeme Bond
Transport Manager
School Support Ltd
P O Box 115, Twizel; or
19 Glenbrook Crescent, Twizel 7901

To be received no later than 4pm 5 March 2010.