Request for Proposal

Campus Development

Architectural Services

RFP released: 1 February 2016

Deadline for Questions: 5pm 19 February 2016

Deadline for Proposals: 4pm 29 February 2016

Contents

SECTION 1: Key information

1.1 Context

This Request for Proposal (RFP) is an invitation to suitably qualified suppliers to submit a Proposal for providing Architectural services to deliver Otago Polytechnics Campus Development Plan.

This RFP is a single-step procurement process.

Words and phrases that have a special meaning are shown by the use of capitals e.g. respondent, which means '*a person, organisation, business or other entity that submits a Proposal in response to the RFP. The term Respondent includes its officers, employees, contractors, consultants, agents and representatives. The term Respondent differs from a supplier, which is any other business in the market place that does not submit a Proposal*.' Definitions are at the end of Section 6.

1.2 Tender timeline

The timeline for this RFP is as follows:

Steps in RFP process:	**Date:**
Submission of RFP to Respondents	1 February 2016
Scheduled campus site visits	11-12 February 2016
Deadline for Questions from suppliers:	19 February 2016
Deadline for Otago Polytechnic to answer suppliers' questions:	24 February 2016
Deadline for Proposals: 4.00pm	29 February 2016
Shortlisted Respondents' presentations:	7 March 2016
Anticipated Contract start date:	21 March 2016

All dates and times are dates and times in New Zealand.

1.3 Tender communication

All enquiries must be directed to the Point of Contact. All external communications through this Point of Contact.

Nominated Point of Contact

Name: Shaun Pont - Project Director

Tracey Howell – Otago Polytechnic Campus Project Manager

Annie Blair – Otago Polytechnic Campus Project Administrator

Email address: shaunp@logicgroup.co.nz / tracey.howell@op.ac.nz / annie.blair@op.ac.nz

1.4 Developing and submitting your Proposal

a. This is an open, competitive tender process. The RFP sets out the step-by-step process and conditions that apply.

b. Take time to read and understand the RFP. In particular:

   i. Develop a strong understanding of our Requirements detailed in Section 3.

   ii. In structuring your Proposal consider how it will be evaluated. Section 4 describes our Evaluation Approach.

c. For helpful hints on tendering and access to a supplier resource centre go to: www.procurement.govt.nz / for suppliers.

d. If anything is unclear or you have a question, ask us to explain. Please do so before the Deadline for Questions. Email our Point of Contact.

e. Check you have provided all information requested, and in the format and order asked for.

f. Having done the work don't be late – please ensure you get your Proposal to us before the Deadline for Proposals

1.5 Address for submitting your Proposal

a. Proposals must be submitted by email to the following address:

   shaunp@logicgroup.co.nz; tracey.howell@op.ac.nz and annie.blair@op.ac.nz

b. Proposals sent by post or fax, or hard copy delivered to our office, will not be accepted.

1.6 RFP Process, Terms and Conditions

a. **Offer Validity Period**: In submitting a Proposal the Respondent agrees that their offer will remain open for acceptance by the Buyer for three calendar months from the Deadline for Proposals.

b. The RFP is subject to the RFP Process, Terms and Conditions (shortened to RFP-Terms) described in Section 6.

1.7 Later changes to the RFP or RFP process

a. If, after publishing the RFP, we need to change anything about the RFP, or RFP process, or want to provide suppliers with additional information we will let all suppliers know by placing a notice on the Otago Polytechnic website at www.op.ac.nz and the Government Electronic Tender site www.gets.govt.nz

SECTION 2: About the Project

2.1 Project Overview

This procurement relates to the delivery of the Otago Polytechnic Council approved Strategic Asset Management Plan as part of the Otago Polytechnic Campus Development (OPCD).

OPCD incorporates the delivery of multiple projects across the two primary Otago Polytechnic (OP) Dunedin Sites.

The two Sites are located at Forth Street (main Site) and Albany Street, currently occupied by Art, Vet Nursing and part of the Architecture, Building and Engineering schools.

OP have recently completed internal consultation to identify co-location and future development synergies across schools to ensure any future development maximises collaboration benefit across the campus. This consultation has resulted in a preliminary Development Plan. A copy of the executive summary from this document is included at **Appendix A** to aid in brief development. It is expected that the Architect in consultation with the wider project team will review the Campus Development Plan and validate any assumptions or development rationale.

FORTH STREET – CREATIVE PRECINCT

The Creative Precinct is driven by the need to provide fit for purpose learning and teaching spaces and workshops for OP's Art and Design Schools. While a new facility built in 2007 (P Block) included purpose built art gallery, lecture rooms and workshops, some of the Art School is still housed in 1930's wooden buildings. These were originally designed as Intermediate School classrooms and are not suitable for contemporary tertiary education requirements. The new purpose built buildings will allow learning spaces which facilitate cross-disciplinary and cross institutional collaborative learning opportunities which are open to promote optimal space sharing behaviours and maximum utilisation by the Schools of Art and Design.

This new building complex will be designed as an exemplar of our provision so as to model our commitment to creativity and sustainability - as reflected in the pedagogy of our Art and Design School programmes; and as an attribute we aspire to cultivate in all our students. It is proposed that the new creative precinct will be located within the Forth Street Site.

Incorporated within the Creative Precinct will be a new Sustainability Centre that will promote and showcase OP's commitment and research into sustainable outcomes targeted towards a best practice residential scale.

A new Maori Centre will be incorporated within the building which shall provide an integrated facility for Maori immersion and focussed studies.

To achieve a new Creative Precinct will require the relocation of Art from N, O and P Blocks at the Albany Street Site and Design from H Block at the Forth Street Site. Art and Design will accommodate a new purpose built Art & Design building and remodelled A Block building at Forth Street.

Integrated with the Art & Design workshops will be the Campus Services workshop facilities currently located off site and the Workspace Innovation Centre.

Area Analysis

Preliminary stakeholder consultation has identified the following:

School	Existing location	Existing GFA (m2)	Proposed GFA
Art	N, O & P Blocks	4,520	3,600
Design	H Block	2,425	2,400
Innovation Workspace	A Block	750	1,100
Campus Services	Forth Street, Harrow Street, Harbour Terrace	1,020	720
Sustainability Centre	NA	NA	500
Maori Centre		250	500
Total			**8,820**

The above space budget provides a holistic understanding of existing GFA and proposed GFA. Where proposed GFA differs from existing GFA, consideration has been given to projected growth / contraction across individual schools and space synergies achieved through reduced circulation, shared use of teaching studios and area savings achieved by omitting duplication of facility amenity space caused by schools located across multiple buildings.

It is assumed that the proposed Creative Precinct will utilise existing space in A Block which will be modified to suit future needs. The existing GFA of A Block is approximately 3,975m2.

In addition to the areas noted above, sufficient space shall be provided for future decant / growth. An appropriate balance of area will be confirmed during the design development process.

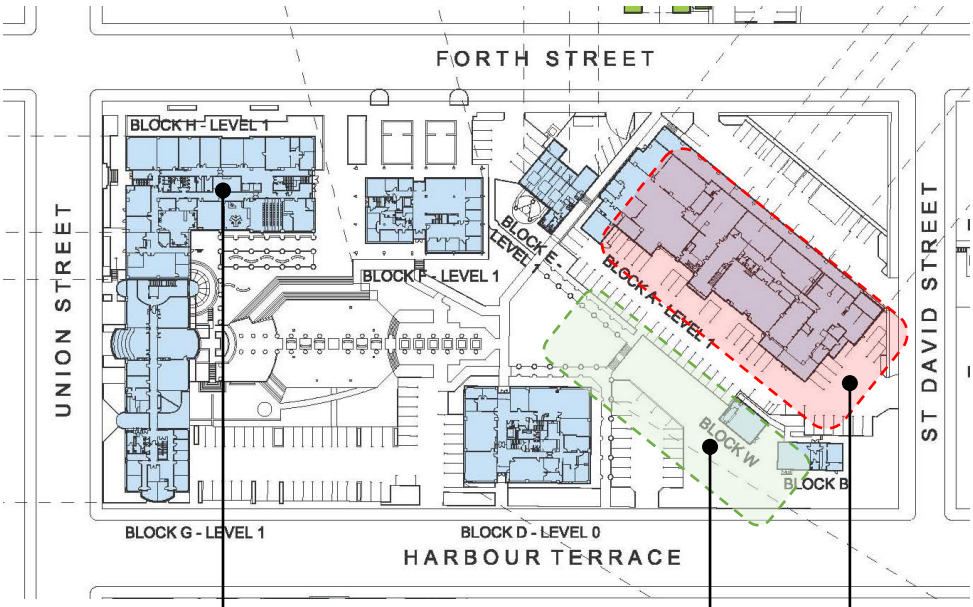
It is noted that the above areas are provided for the purposes of establishing the likely scale for the development. These areas are subject to change following the brief development of the project.

Budget

A total development budget for this facility has not yet been confirmed, however it is expected that the budget for the Creative Precinct will be in the order of $25M to $30M.

Proposed Site

The diagram below provides an indication of the proposed location for the new Creative Precinct. Any new building is likely to provide a physical connection to A Block to enable integration of the Art & Design facilities. Pedestrian circulation and connectivity to other buildings on the Site (i.e. the Learning Link located in H Block) must form part of the design rationale.



H Block – Learning Link

A Block – to be remodelled and integrated to new building

Proposed development site

THE TRADES PRECINCT

The Trades Precinct will be a facility that brings together the Architecture, Building, Engineering, Natural Sciences (Horticulture, Vet Nursing & Animal Health) Schools.

In addition to creating optimal collaborative teaching spaces, one of the drivers of this development is the desire of OP to vacate their existing Architecture, Building and Engineering (ABE) Site currently located across various buildings at Albany Street, Anzac Avenue and Forth Street by mid-2020.

Centralisation of ABE and Natural Sciences will provide the optimum re-configuration of schools to achieve the best learning, teaching and research outcomes for students.

To achieve a new Trades Precinct will require the relocation of ABE from A Block and L Block to the Albany Street Site. It is currently proposed that classroom based ABE activity could be accommodated in the existing P block (with extension) and a new purpose built building will be constructed for trade based activity (carpentry, automotive, engineering).

Vet nursing could be located in the recently constructed O Block.

Area Analysis

Preliminary stakeholder consultation has identified the following:

School	Existing location	Existing GFA (m2)	Proposed GFA
Bespoke workshop space (wood, metal, automotive)	L Block, A block	1,950	1,870
Carpentry Barn – high bay warehouse	L Block	520	500
Generic teaching & administration (classroom based activity)	L Block, A Block, O Block	3,975	3,040
Outdoor Area (House building platform)	L Block	1,200	1,000
Horticulture	L Block	320	300
Vet Nursing	N Block	615	650
Total (excl House build platform)			**6,360**

The above space budget provides a holistic understanding of existing GFA and proposed GFA. Where proposed GFA differs from existing GFA, consideration has been given to projected growth / contraction across individual schools and space synergies achieved through reduced circulation, shared use of teaching studios and area savings achieved by omitting duplication of facility amenity space caused by schools located across multiple buildings.

It is assumed that the proposed Trades Precinct will utilise existing space in P Block and O Block which will be modified to suit future needs. The existing GFA of P Block is approximately 3,190m2, and O Block 900m2.

In addition to the areas noted above, sufficient space shall be provided for future decant / growth. As this site is located away from the main Forth Street Site, an appropriate provision for shared common and amenity space will also be required. An appropriate balance of area will be confirmed during the design development process.

It is noted that the above areas are provided for the purposes of establishing the likely scale for the development. These areas are subject to change following the brief development of the project.

Budget

A total development budget for this facility has not yet been confirmed, however it is expected that the budget for the Trades Precinct will be in the order of $20M to $25M.

Proposed Site

The diagram below provides an indication of the proposed location for the new Trades Precinct. Buildings O and P will be retained and modified for future use. Block N, the Reigo Street house and other ancillary buildings will be demolished. L Block site shaded yellow will be vacated and will not form part of the development area.

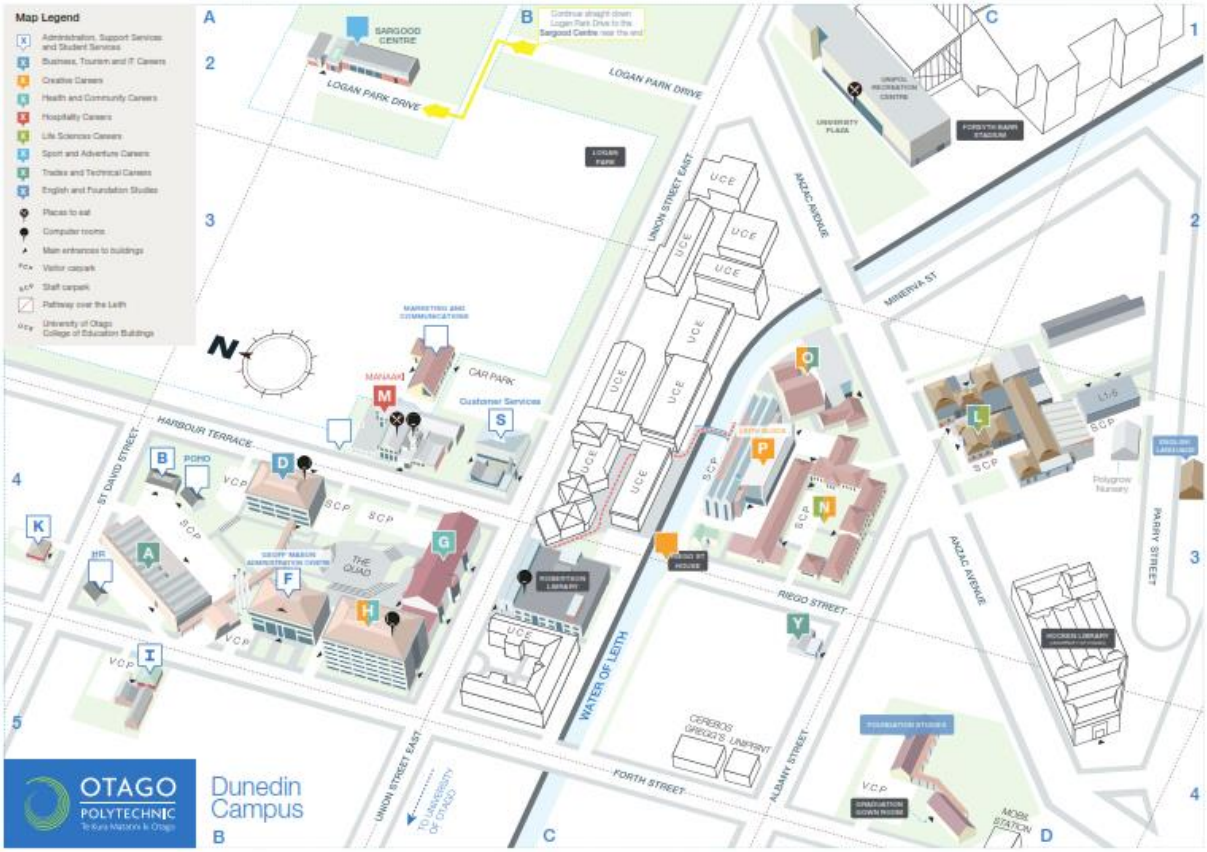
PUBLIC REALM

While the development of the Creative and Trades Precincts represent the two major components of this commission, OP require a review of external spaces at the Forth Street and Albany Street Site. Respondents will be required to develop a wider precinct landscape strategy to identify improved circulation, connectivity, way finding and external community space to promote vibrant communal spaces.

OP has developed a preliminary connectivity strategy. A copy is included at **Appendix B.** The Architect will be responsible for the development of the connectivity strategy as part of the public realm development. This component of the work will also need to incorporate elements of the overall sustainability strategy. A copy of the sustainability framework is included in **Appendix D**.

A project budget for public realm development has not yet been confirmed. This will be developed during the initial scoping phase of the project.

The diagram below provides a holistic map of the wider OP Dunedin campus.



2.2 Primary Deliverables

This RFP relates to the purchase of Architectural services to enable the delivery of the proposed Creative Precinct, Trades Precinct and Public Realm development. Primary deliverables will include:

- Specialist educational facility planning and promotion of international best practice ideologies to help lead the transition into experiential learning and promote the benefits of co-location synergies across campus.
- Cross campus landscape strategy and development rationale.
- Building design for new and remodelled facilities in the proposed Creative Precinct and Trades Precinct.
- Design and specification for all internal finishes, furniture and equipment to support collaborative spaces.
- A development strategy that will minimise temporary decant solutions and minimise disruption to existing schools during construction.
- Design and development solutions that will deliver on OP sustainability principles and objectives.

We note that other primary consultants including project management, engineering and quantity surveying services are excluded from this RFP and will be commissioned separately.

2.3 Scope of Services

Design services will follow standard industry design deliverable rationale as defined by NZ Construction Industry Council Guidelines and NZIA design deliverables. It is noted that while industry standard deliverables are summarised in CIC and NZIA documents, OP require project specific deliverables during each of the design phases. Refer to **Appendix C** for a detailed schedule of services to be provided.

It is proposed that building design will be completed simultaneously across campus.

Key deliverables during each design stage in addition to CIC and NZIA guidelines are summarised as follows:

Return Brief and Preliminary Concept Design

The return brief will confirm the following:

- Analysis of emerging trends through tertiary education best practice design principles
- Detailed area analysis for each school
- Detailed synopsis of spatial requirements, co-location synergy
- Quantification of specialist space vs generic space supported by a time tabling analysis
- Analysis of site specific conditions including accessibility, ground conditions, visibility, environmental conditions
- A masterplan for each of the proposed sites indicating various development options and development sequencing
- Internal arrangement diagrams indicating spatial co-location opportunities

- Preliminary time line supporting the development of the polytechnic in stages (by others)
- Identification of environmentally sustainable design principles to be incorporated into the project
- Preliminary Rough Order Cost analysis for the proposed development based upon benchmark facility square meter development costs (by others)
- Preliminary development cash flow indicating expenditure for the development across the duration of the project (by others)
- Identification of key project risks, analysis and mitigation strategies.
- The return brief will be presented in a consolidated report. A detailed presentation of the return brief will be provided to all project stakeholders and OP Council.

The return brief will be used as a briefing document to aid in the appointment of the following design consultants:

- Structural Engineer
- RMA Planner
- Geotechnical Engineer
- Civil Engineer
- Mechanical Services Consultant
- Fire Engineer

At the completion of the Concept Design Phase a formal gateway approval process will be established to confirm with the PCG that the proposed design meets acceptable design and cost hurdles before progressing to the Preliminary Design phase.

Preliminary Design

The primary deliverable for the Preliminary Design phase is to refine a preferred concept and test for technical compliance. This will include investigation of preliminary structural solutions, foundation solutions, building services strategies, sustainability options, fire protection and life safety.

The outcome of this preliminary design phase will prove the Concept and provide further information that may impact on operational and functional requirements for the building.

The preliminary design will be developed over multiple design workshops. The following items will be tested:

- Overlay of a proposed structural frame to achieve the general architectural intent
- Overlay of architectural design to ensure sufficient areas are allowed for building services distribution throughout the building
- An analysis of the building means of escape to test vertical and horizontal circulation paths
- Desktop analysis for ground conditions to determine likely foundation solutions to aid in the development of construction costs
- Façade study to determine preferred façade systems and general materiality selection
- Assessment of the proposed design for compliance against the operative city plan.
- Refinement of the internal spatial plans with individual schools

In collaboration with the Project manager the Architect will be responsible for leading the development of a combined design discipline Preliminary Design Report. The Preliminary Design Report shall be supported by and will include:

- Coordinated preliminary design documentation
- Preliminary elemental estimate for the proposed development
- Proposed staging strategy
- Detailed master development programme
- Refined development cash flow
- Updated detailed risk analysis and mitigation plan
- Assessment of the design against best practice sustainability outcomes supported by preliminary cost benefit analysis.
- 3D flythrough model with selected still renders of the proposed campus plans and buildings.

The Preliminary Design Report will be used for presentation to the PCG and project stakeholders. This report will be used to confirm the basis of future design development during the Developed Design phase of the project.

At the completion of the Preliminary Design Phase a formal gateway approval process will be established to confirm with the PCG that the proposed design meets acceptable design, cost and risk hurdles before progressing to the Developed Design phase.

Developed Design

The primary deliverable for the Developed Design phase is to refine the preliminary design and test initial design assumptions incorporated in the Preliminary Design phase. For example,

- Detailed geotechnical analysis to enable a refinement of ground remediation and foundation solutions to test the assumptions made in structural models.
- Select and size mechanical plant to achieve the performance criteria specified
- Size duct runs, service risers and the like
- Develop façade designs to test performance criteria, glass specifications and internal thermal comfort conditions
- Confirm internal spatial drawings, proposed furniture layouts and integration with technology
- Prepare internal and external finishes schedules for testing final materiality, and colour selection
- Prepare preliminary external landscape solutions.

In collaboration with the Project manager the Architect will be responsible for leading the preparation of a Developed Design Report for presentation to the PCG and project stakeholders. The developed design report will include the following:

- Coordinated design report
- Landscape Strategy

- Building materiality selection
- Integrated building services, architectural and structural solutions
- Refined façade solution
- Detailed elemental cost plan
- Finishes Schedules
- Final School layouts and proposed furniture plans
- Refined master development programme
- Refined development cash flow
- Updated detailed risk analysis and mitigation plan

The developed design will be completed over various design workshops. Ongoing consultation with project stakeholders will continue to ensure the developed design addresses the functional needs for the schools.

At the completion of the Developed Design Phase a formal gateway approval process will be established to confirm with the PCG that the proposed design meets acceptable design, cost and risk hurdles before progressing to the Detailed Design phase

Detailed Design

Upon approval from OP to proceed with the detailed design, the Architect will lead the coordination of the design team to establish working drawings for the project. At the completion of the Detailed Design phase of the project, the primary deliverable will be a set of tender and building consent issue documentation. The detailed design documentation will include a completely integrated set of design documents including drawings, specifications and a coordinated 3D Model.

During the detailed design phase, the Project Manager in consultation with the Architect will facilitate early engagement with Dunedin City Council building consent officers to assist in the processing of building consent documentation in a timely fashion. As OP will be progressing multiple projects including various enabling works and decanting projects, the design team would work with DCC to ensure a dedicated building consent officer is allocated to OP projects.

The Project Manager will maintain an effective change management process throughout the Detailed Design phase to ensure there is no “design creep” from approved developed design documentation. A formal change management process will be developed to ensure any design development fits within allocated budgets and quality expectations.

Construction Procurement

There are various types of construction procurement models that could be adopted on the various projects. The decision around the final procurement model will generally be determined by OP’s risk profile and flexibility within the overall development programme.

While a final procurement strategy has not yet been confirmed, it is likely that the design will be delivered using a standard traditional approach with a construction contract(s) being let under an industry standard NZS3910 form.

For the purposes of the Architect RFP, consultants should assume traditional construction delivery with design projects running simultaneously.

The architect will be included in the evaluation panel for selection and appointment of the contractor.

Contract Administration / Construction Observation

General contract administration will be led by the Project Manager / Engineer to the contract. The Architect will be responsible for maintaining their own Consultant Advice Notice (CAN) system which shall be developed as a required to ensure a coordinated project specific administration protocol.

Architects shall allow to provide ongoing construction observation as required to an Observation Level 3 as defined by NZIA schedule of services.

General Project Communication & Reporting

The Architect will be responsible for providing a written monthly design status report to confirm progress of the design development for the project. The design report will be incorporated into a monthly PCG report for the project.

The Architect will be a member of the PCG and will be required to attend monthly PCG meetings or as required by the project.

Value Engineering Services

At the completion of the Preliminary and Developed Design phases, there will formal value engineering and risk management workshops. It is expected that the Architect will play an active role in these workshops and respond by updating design documentation to reflect necessary project change to remain on brief and budget.

Design System Protocol

In consultation with the wider project team, the Architect will recommend the preferred design system protocol for the project. For the purposes of this RFP, Architects should assume the design system should be developed using REVIT. Building Information Modelling will be utilised for building structure and services integration and coordination.

Sustainable Design

OP want to consider all aspects to ensure that their campus is a showcase for sustainability innovation and ensure that their campus development plan considers all aspects through design, delivery and management. OP considers the social impact of each decision it makes. It's all about balancing their goals with practices that protect and support our society and environment. OP have made a pledge, both to their community and their students, to do the right thing – working towards a sustainable future for ourselves, and future generations.

Included at **Appendix D** is a copy of the sustainability framework for this project. This document forms a key component of the project brief.

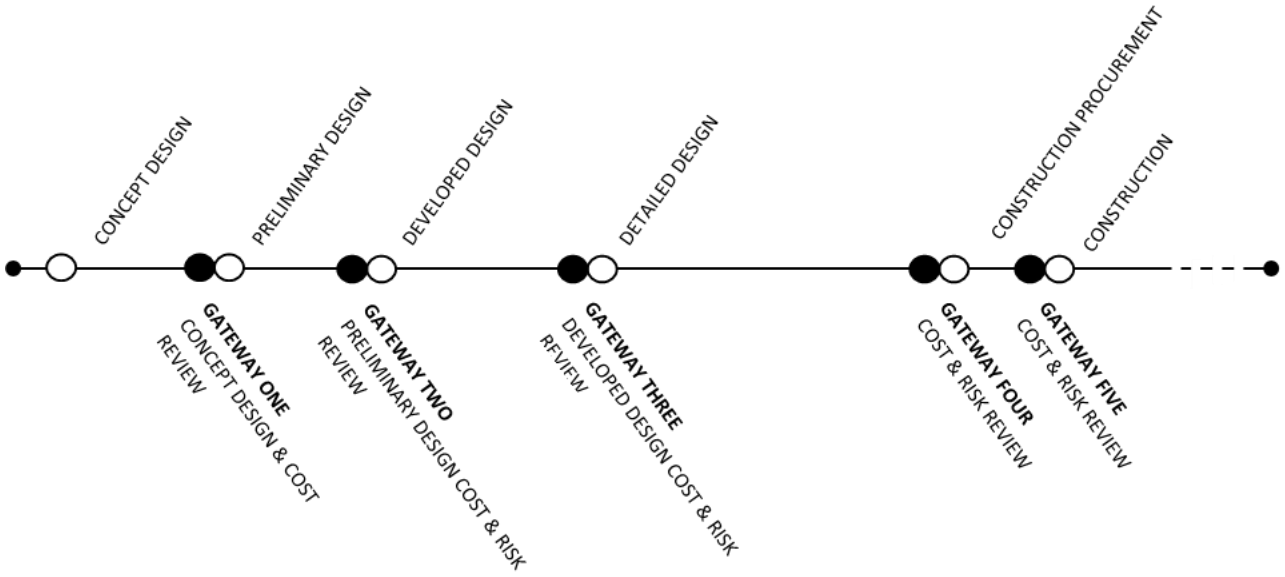
2.4 Preliminary Development Programme

Preparation of a final staging strategy and development programme will be completed as part of the initial scoping phase of the project.

A preliminary staging sequence and development programme is included at **Appendix E.** This has been provided to assist in defining a suggested staging sequence to minimise decant and temporary accommodation requirements for the project. It is noted this development programme will be updated during the early phases of the project scoping once individual projects are confirmed.

For the purposes of the Architect fee establishment, Consultants should assume the following project phases and indicative time frames:

Design	March 2016 to March 2017
Construction Procurement	May 2017 to July 2017
Construction	July 2017 to November 2020
Target Project Completion	2021

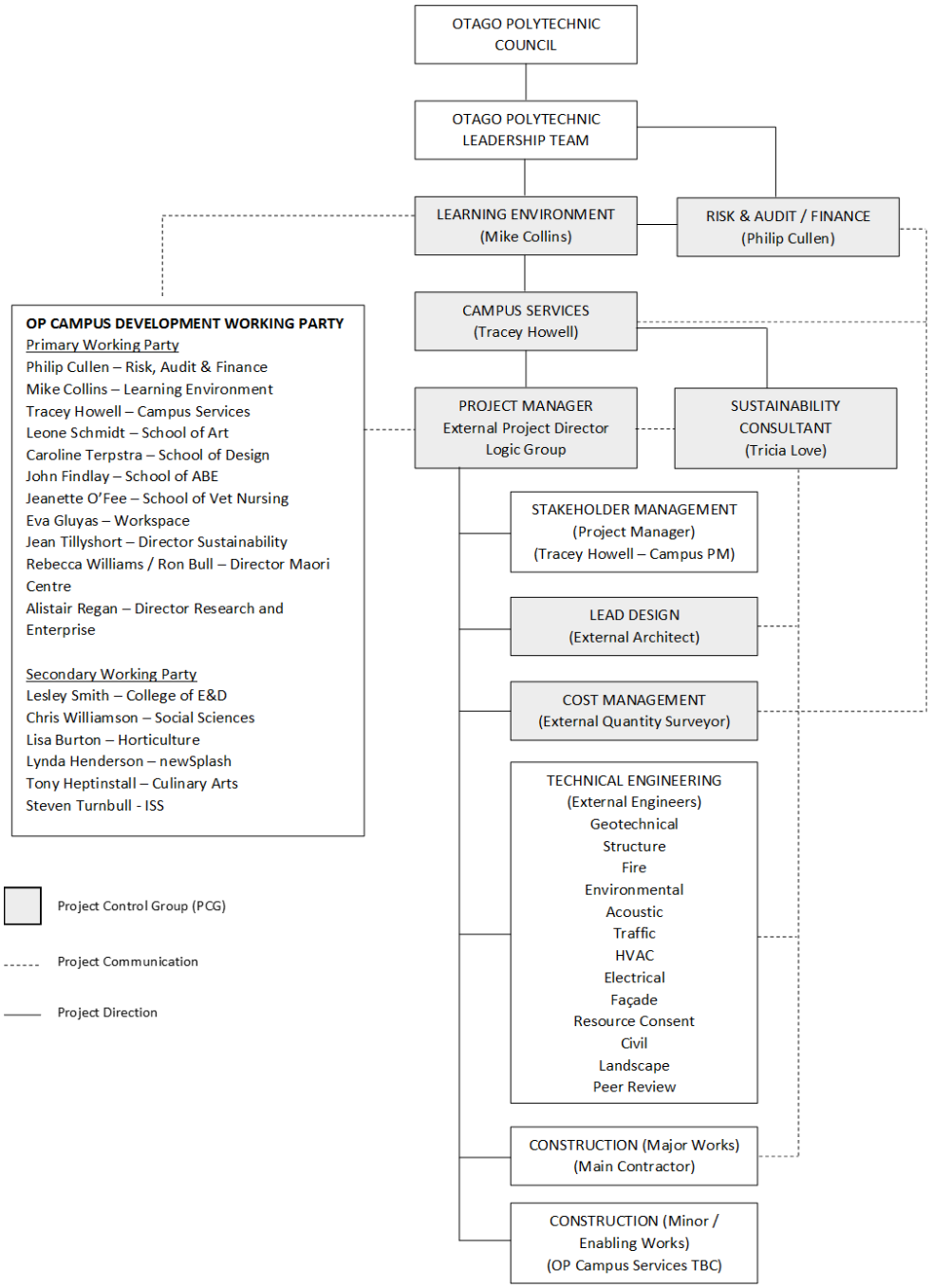


2.5 Stakeholder Engagement

We are seeking an Architect that maintains strong and effective stakeholder engagement skills. The Architect will specialise in international best practice educational space planning and shall demonstrate the benefits of future experiential learning trends.

In collaboration with the Project Manager, The Architect will lead multiple stakeholder consultation workshops to help develop the project brief and maintain overall stakeholder engagement.

The diagram below provides an indication of the proposed project structure and the parties likely to be included in wider project consultation.



SECTION 3: What we require

3.1 Information Required

This section outlines the information required to be submitted as part of your proposal. Failure by the respondents to provide the information requested may result in your proposal being discounted from the evaluation process.

3.2 Capability

Architects shall demonstrate the capability of their organisation and proposed team with respect to the following:

- Stakeholder consultation
- Specialist education planning and demonstrated knowledge of international best practice principles that could be applied to the OPCD.
- Public realm and campus landscape design
- Delivery of education projects with a value in excess of $10M, including the percentages of work performed with your own workforce, and the inclusion of that workforce within this project.
- Environmentally sustainable design, specifically related to Living Building Challenge projects and Greenstar (minimum 5 star).

3.3 Proposed Team

It is noted that the skills required from the Architects may not all be held in a single organisation. As such Architects may choose to partner / collaborate with other organisations / specialists to identify a best for project team. Architects shall provide a detailed CV for each of their nominated team members that summarises the following:

- Name of proposed team member and associated qualifications years of experience
- Confirmation whether the team member is a full time / part time employee of the organisation or whether the individual is a contractor
- Project specific experience relevant to this commission
- The location of where the proposed team member resides and including their primary office location.
- Two referees of past clients where the nominated team member has provided a similar role to that proposed for this project.

3.4 Team Structure and Availability

Architects shall provide a proposed team structure indicating how your proposed team will interact on the project. This should be supported by a resource schedule that clearly demonstrates the involvement of each nominated team member during the course of the project.

3.5 Proposed Methodology

Architects shall provide a detailed methodology on how they would propose to undertake initial stakeholder engagement for the purposes of completing the return Brief / Concept Design phase of the project. Of particular importance is the introduction, recommendation and engagement of the project stakeholders into international best practice educational trends that are applicable and scalable to Otago Polytechnic.

3.6 Process and Systems

Confirmation of internal process and systems used for ensuring full coordination of design across multiple design disciplines to ensure project budgets are maintained, design remains on brief without design scope creep and end tender design documentation is coordinated to minimise impact of project variations.

3.7 Sustainability

Demonstration of your company's systems, procedures and commitment to environmental sustainability. This shall be demonstrated for both:

1. Organisational commitment to sustainability through day to day operation of your company
2. Project specific capability of your nominated project team with respect to sustainable design principles, including specific experience with Living Building Challenge buildings and Greenstar (minimum 5 star).

3.8 Knowledge Sharing and Transfer

Otago Polytechnic are committed to delivering best practice relevant industry knowledge to their students. Architects shall advise what opportunities they believe are available to maximise engagement with students and create an appropriate level of knowledge transfer from this project.

Also note that Otago Polytechnic are committed to an Open Book Policy of knowledge sharing with particular reference to sustainability information. Refer to the Purpose and Vision document in the Sustainability Brief included in **Appendix D** for further information.

3.9 Price

Consultants shall provide a fee that could be represented as either a Lump Sum or percentage of total construction cost. Where architects nominate their fee based on a percentage of construction cost, it is noted that the fee shall be established based upon the Quantity Surveyors estimated construction cost excluding overall project contingency. Design fees will be fixed as a Lump Sum pro-rata based upon the agreed percentage fee applicable to the tendered construction cost. No adjustments to the fee will be made during construction for any project variations.

Consultants shall include a fixed disbursement fee that shall allow for all local travel to Dunedin as required for the duration of the project, general project printing and communications. Consultants shall provide breakdown of their proposed fee noting any specific assumptions made.

As part of your bid please include a proposed drawdown structure for each of the respective design phases.

If a Respondent offers a price that is substantially lower than other Proposals (an abnormally low bid), the Buyer may seek to verify with the Respondent that the Respondent is capable of fully delivering all of the Requirements and meeting all of the conditions of the Proposed Contract for the price quoted.

Further details relating to the required pricing structure are included in section 4.0.

3.10 Tender Pre-Conditions

To enable your organisation tender to be considered for this project, the following pre-conditions must be achieved:

1. Confirmation that your organisation regularly participates in educational design projects in excess of $10M, including the percentages of work performed with your own workforce, and the inclusion of that workforce within this project.
2. Confirmation that your organisation has Professional Indemnity and Public liability insurance cover of $5M.

3. Confirmation that your organisation has or will have a local presence during the course of the project.
4. Confirmation that your organisation has undertaken either a Living Building Challenge project and/or a Greenstar certified project (minimum 4-star certification).
5. Confirmation that your organisation has the ability to start the project immediately upon contract award
6. Completion and execution of the tender declaration form included at **Appendix F.**

SECTION 4: Pricing information

4.1 Pricing information to be provided by respondents

Respondents are to provide their price as part of their Proposal. Shortlisted respondents will be expected to show an open book pricing breakdown as part of their presentation. Because it is likely but not necessary that for the Architect services we will engage for the entire Campus Development Plan, in submitting the Price the Respondent must breakdown costings as per the below phases:

a. Respondents are to provide a breakdown by design phases ie;

- Return Brief and Concept Design Phase
- Preliminary Design Phase
- Developed Design Phase
- Detailed Design Phase
- Construction Phase

b. A proposed project payment breakdown is to be included as part of this proposal.

c. The pricing schedule is to show a breakdown of all costs, fees, expenses and charges associated with the full delivery of the Requirements over the whole-of-life of the Contract. It must also clearly state the total Contract price exclusive of GST.

d. Where the price, or part of the price, is based on fee rates, all rates are to be specified, either hourly or daily or both as required.

e. In preparing their Proposal, Respondents are to consider all risks, contingencies and other circumstances relating to the delivery of the Requirements and include adequate provision in the Proposal and pricing information to manage such risks and contingencies.

f. Respondents are to document in their Proposal all assumptions and qualifications made about the delivery of the Requirements, including in the financial pricing information. Any assumption that the Buyer or a third party will incur any cost related to the delivery of the Requirements is to be stated, and the cost estimated if possible.

g. Prices should be tendered in NZ$.

h. Where a Respondent has an alternative method of pricing (i.e. a pricing approach that is different to the pricing schedule) this can be submitted as an alternative pricing model. However, the Respondent must also submit a pricing schedule that conforms.

i. Where two or more Respondents intend to lodge a joint or consortium Proposal the pricing schedule is to include all costs, fees, expenses and charges chargeable by all Respondents.

SECTION 5: Our Evaluation Approach

5.1 Evaluation model

The evaluation model that will be used is a weighted attribute (weighted criteria). The Proposal that scores the highest will likely, but not necessarily, be selected as the Successful Respondent.

5.2 Pre-conditions

Each Proposal must meet all of the following pre-conditions. Proposals which fail to meet one or more will be eliminated from further consideration.

Respondents who are unable to meet all pre-conditions should conclude that they will not benefit from submitting a Proposal.

1. Confirmation that your organisation regularly participates in educational design projects in excess of $10M.
2. Confirmation that your organisation has Professional Indemnity and Public liability insurance cover of $5M.
3. Confirmation that your organisation has or will have a local presence during the course of the project.
4. Confirmation that your organisation has the ability to start the project immediately upon contract award
5. Completion and execution of the tender declaration form included at **Appendix F**.

5.3 Evaluation criteria

Proposals which meet all pre-conditions will be evaluated on their merits according to the following evaluation criteria and weightings.

Criterion	**Weighting**
1. Capability and Proposed Team (items 3.2, 3.3, 3.4)	**35%**
2. Proposed methodology (Item 3.5)	**10%**
3. Process and Systems (item 3.6)	**5%**
4. Sustainability (item 3.7)	**10%**
5. Knowledge Transfer (item 3.8)	**10%**
6. Price (item 3.9)	**30%**
Total weightings	**100%**

6.4 Scoring

The following scoring scale will be used in evaluating Proposals. Scores by individual panel members may be modified through a moderation process across the whole evaluation panel.

Rating	Definition	Score
EXCELLENT significantly exceeds the criterion	Exceeds the criterion. Exceptional demonstration by the Respondent of the relevant ability, understanding, experience, skills, resource and quality measures required to meet the criterion. Proposal identifies factors that will offer potential added value, with supporting evidence.	**9-10**
GOOD exceeds the criterion in some aspects	Satisfies the criterion with minor additional benefits. Above average demonstration by the Respondent of the relevant ability, understanding, experience, skills, resource and quality measures required to meet the criterion. Proposal identifies factors that will offer potential added value, with supporting evidence.	**7-8**
ACCEPTABLE meets the criterion in full, but at a minimal level	Satisfies the criterion. Demonstration by the Respondent of the relevant ability, understanding, experience, skills, resource, and quality measures required to meet the criterion, with supporting evidence.	**5-6**
MINOR RESERVATIONS marginally deficient	Satisfies the criterion with minor reservations. Some minor reservations of the Respondent's relevant ability, understanding, experience, skills, resource and quality measures required to meet the criterion, with little or no supporting evidence.	**3-4**
SERIOUS RESERVATIONS significant issues that need to be addressed	Satisfies the criterion with major reservations. Considerable reservations of the respondent's relevant ability, understanding, experience, skills, resource and quality measures required to meet the criterion, with little or no supporting evidence.	**1-2**
UNACCEPTABLE significant issues not capable of being resolved	Does not meet the criterion. Does not comply and/or insufficient information provided to demonstrate that the Respondent has the ability, understanding, experience, skills, resource and quality measures required to meet the criterion, with little or no supporting evidence.	**0**

6.5 Evaluation process and due diligence

In addition to the above, we will undertake the following process and due diligence in relation to shortlisted Respondents. The findings will be taken into account in the evaluation process.

a. reference check the Respondent organisation and named personnel

b. interview Respondents

c. Request shortlisted Respondents make a presentation.

SECTION 6: RFP Process, Terms and Conditions

Note to suppliers and Respondents

1. In managing this procurement the Buyer will endeavour to act fairly and reasonably in all of its dealings with interested suppliers and Respondents, and to follow due process which is open and transparent.
2. This section contains the government's standard RFP Process, Terms and Conditions (shortened to RFP-Terms) which apply to this procurement. Any variation to the RFP-Terms will be recorded in Section 1, paragraph 1.6. Check to see if any changes have been made for this RFP.
3. Words and phrases that have a special meaning are shown by the use of capitals e.g. Respondent, which means '*a person, organisation, business or other entity that submits a Proposal in response to the RFP. The term Respondent includes its officers, employees, contractors, consultants, agents and representatives. The term Respondent differs from a supplier, which is any other business in the market place that does not submit a Proposal*.' Definitions are at the end of this section.
4. If you have any questions about the RFP-Terms please email our Point of Contact.

Standard RFP process

Preparing and submitting a proposal

Preparing a Proposal

a. Respondents are to use the Response Form provided and include all information requested by the Buyer in relation to the RFP.

b. By submitting a Proposal the Respondent accepts that it is bound by the RFP Process, Terms and Conditions (RFP-Terms) contained in Section 6 (as varied by Section1, paragraph 1.6, if applicable).

c. Each Respondent will:

- examine the RFP and any documents referenced in the RFP and any other information provided by the Buyer
- consider all risks, contingencies and other circumstances relating to the delivery of the Requirements and include adequate provision in its Proposal to manage such risks and contingencies
- document in its Proposal all assumptions and qualifications made about the delivery of the Requirements, including any assumption that the Buyer or a third party will deliver any aspect of the Requirements or incur any cost related to the delivery of the Requirements
- ensure that pricing information is quoted in NZ$ exclusive of GST

- if appropriate, obtain independent advice before submitting a Proposal
- satisfy itself as to the correctness and sufficiency of its Proposal, including the proposed pricing and the sustainability of the pricing.

d. There is no expectation or obligation for Respondents to submit Proposals in response to the RFP solely to remain on any prequalified or registered supplier list. Any Respondent on such a list will not be penalised for failure to submit a Proposal.

Offer Validity Period

- Proposals are to remain valid and open for acceptance by the Buyer for the Offer Validity Period.

Respondents' Deadline for Questions

- Each Respondent should satisfy itself as to the interpretation of the RFP. If there is any perceived ambiguity or uncertainty in the RFP document/s Respondents should seek clarification before the Deadline for Questions.
- All requests for clarification must be made by email to the Buyer's Point of Contact. The Buyer will endeavour to respond to requests in a timely manner, but not later than the deadline for the Buyer to answer Respondents' questions in Section 1, paragraph 1.2.a, if applicable.
- If the Buyer considers a request to be of sufficient importance to all Respondents it may provide details of the question and answer to other Respondents. In doing so the Buyer may summarise the Respondent's question and will not disclose the Respondent's identity. The question and answer may be posted on GETS and/or emailed to participating Respondents. A Respondent may withdraw a request at any time.
- In submitting a request for clarification a Respondent is to indicate, in its request, any information that is commercially sensitive. The Buyer will not publish such commercially sensitive information. However, the Buyer may modify a request to eliminate such commercially sensitive information, and publish this and the answer where the Buyer considers it of general significance to all Respondents. In this case, however, the Respondent will be given an opportunity to withdraw the request or remove the commercially sensitive information.

Submitting a Proposal

a. Each Respondent is responsible for ensuring that its Proposal is received by the Buyer at the correct address on or before the Deadline for Proposals. The Buyer will acknowledge receipt of each Proposal.

b. The Buyer intends to rely on the Respondent's Proposal and all information provided by the Respondent (e.g. correspondence and negotiations). In submitting a Proposal and communicating with the Buyer each Respondent should check that all information it provides to the Buyer is:

- true, accurate and complete, and not misleading in any material respect
- does not contain Intellectual Property that will breach a third party's rights.

c. Where the Buyer requires the Proposal to be delivered in hard and soft copies, the Respondent is responsible for ensuring that both the hard and soft copies are identical.

d. Where the Buyer stipulates a two envelope RFP process the following applies:
    1. each Respondent must ensure that all financial information and pricing components of its Proposal are provided separately from the remainder of its Proposal
    2. financial information and pricing must be contained either in a separate sealed envelope or as a separate soft copy file (whichever option has be requested by the Buyer)
    3. the pricing information must be clearly marked 'Financial and Pricing Information.' This is to ensure that the pricing information cannot be viewed when the package containing the other elements of the Proposal is opened.

Assessing Proposals

○ Evaluation panel

i. The Buyer will convene an evaluation panel comprising members chosen for their relevant expertise and experience. In addition, the Buyer may invite independent advisors to evaluate any Proposal, or any aspect of any Proposal.

○ Third party information

i. Each Respondent authorises the Buyer to collect additional information, except commercially sensitive pricing information, from any relevant third party (such as a referee or a previous or existing client) and to use that information as part of its evaluation of the Respondent's Proposal.

ii. Each Respondent is to ensure that all referees listed in support of its Proposal agree to provide a reference.

iii. To facilitate discussions between the Buyer and third parties each Respondent waives any confidentiality obligations that would otherwise apply to information held by a third party, with the exception of commercially sensitive pricing information.

○ Buyer's clarification

i. The Buyer may, at any time, request from any Respondent clarification of its Proposal as well as additional information about any aspect of its Proposal. The Buyer is not required to request the same clarification or information from each Respondent.

ii. The Respondent must provide the clarification or additional information in the format requested. Respondents will endeavour to respond to requests in a timely manner. The Buyer may take such clarification or additional information into account in evaluating the Proposal.

iii. Where a Respondent fails to respond adequately or within a reasonable time to a request for clarification or additional information, the Buyer may cease evaluating the Respondent's Proposal and may eliminate the Proposal from the RFP process.

○ Evaluation and shortlisting

1. The Buyer will base its initial evaluation on the Proposals submitted in response to the RFP. The Buyer may adjust its evaluation of a Proposal following consideration of any clarification or additional information as described in paragraphs 6.6 and 6.7.
2. In deciding which Respondent/s to shortlist the Buyer will take into account the results of the evaluations of each Proposal and the following additional information:

- each Respondent's understanding of the Requirements, capability to fully deliver the Requirements and willingness to meet the terms and conditions of the Proposed Contract
- except where the price is the only criterion, the best value-for-money over the whole-of-life of the goods or services.

3. In deciding which Respondent/s, to shortlist the Buyer may take into account any of the following additional information:
    1. the results from reference checks, site visits, product testing and any other due diligence
    2. the ease of contracting with a Respondent based on that Respondent's feedback on the Proposed Contract (where these do not form part of the weighted criteria)
    3. any matter that materially impacts on the Buyer's trust and confidence in the Respondent
    4. any other relevant information that the Buyer may have in its possession.
5. The Buyer will advise Respondents if they have been shortlisted or not. Being shortlisted does not constitute acceptance by the Buyer of the Respondent's Proposal, or imply or create any obligation on the Buyer to enter into negotiations with, or award a Contract for delivery of the Requirements to any shortlisted Respondent/s. At this stage in the RFP process the Buyer will not make public the names of the shortlisted Respondents.

○ Negotiations

i. The Buyer may invite a Respondent to enter into negotiations with a view to contract. Where the outcome is unsatisfactory the Buyer may discontinue negotiations with a Respondent and may then initiate negotiations with another Respondent.

ii. The Buyer may initiate concurrent negotiations with more than one Respondent. In concurrent negotiations the Buyer will treat each Respondent fairly, and:
    1. prepare a negotiation plan for each negotiation
    2. advise each Respondent, that it wishes to negotiate with, that concurrent negotiations will be carried out
    3. hold separate negotiation meetings with each Respondent.

iii. Each Respondent agrees that any legally binding contract entered into between the Successful Respondent and the Buyer will be essentially in the form set out in Section 5, the Proposed Contract.

○ Respondent's debrief

6 At any time after shortlisting Respondents the Buyer will offer all Respondents who have not been shortlisted a debrief. Each Respondent will have 30 Business Days, from the date of offer, to request a debrief. When a Respondent requests a debrief, the Buyer will provide the debrief within 30 Business Days of the date of the request, or of the date the Contract is signed, whichever is later.

7 The debrief may be provided by letter, email, phone or at a meeting. The debrief will:
    1. provide the reasons why the Proposal was or was not successful

2. explain how the Proposal performed against the pre-conditions (if applicable) and the evaluation criteria
3. indicate the Proposal's relative strengths and weaknesses
4. explain, in general terms, the relative advantage/s of the successful Proposal
5. seek to address any concerns or questions from the Respondent
6. seek feedback from the Respondent on the RFP and the RFP process.

Notification of outcome

i. At any point after conclusion of negotiations, but no later than 30 Business Days after the date the Contract is signed, the Buyer will inform all unsuccessful Respondents of the name of the Successful Respondent, if any. The Buyer may make public the name of the Successful Respondent and any unsuccessful Respondent. Where applicable, the Buyer will publish a Contract Award Notice on GETS.

Issues and complaints

a. A Respondent may, in good faith, raise with the Buyer any issue or complaint about the RFP, or the RFP process at any time.
b. The Buyer will consider and respond promptly and impartially to the Respondent's issue or complaint.
c. Both the Buyer and Respondent agree to act in good faith and use their best endeavours to resolve any issue or complaint that may arise in relation to the RFP.
d. The fact that a Respondent has raised an issue or complaint is not to be used by the Buyer to unfairly prejudice the Respondent's ongoing participation in the RFP process or future contract opportunities.

Standard RFP conditions

Buyer's Point of Contact

a. All enquiries regarding the RFP must be directed by email to the Buyer's Point of Contact. Respondents must not directly or indirectly approach any representative of the Buyer, or any other person, to solicit information concerning any aspect of the RFP.
b. Only the Point of Contact, and any authorised person of the Buyer, are authorised to communicate with Respondents regarding any aspect of the RFP. The Buyer will not be bound by any statement made by any other person.
c. The Buyer may change the Point of Contact at any time. The Buyer will notify Respondents of any such change. This notification may be posted on GETS or sent by email.
d. Where a Respondent has an existing contract with the Buyer then business as usual communications, for the purpose of managing delivery of that contract, will continue using the usual contacts. Respondents must not use business as usual contacts to lobby the Buyer, solicit information or discuss aspects of the RFP.

Conflict of Interest

3 Each Respondent must complete the Conflict of Interest declaration in the Response Form and must immediately inform the Buyer should a Conflict of Interest arise during the RFP process. A material Conflict of Interest may result in the Respondent being disqualified from participating further in the RFP.

- ### Ethics

  i. Respondents must not attempt to influence or provide any form of personal inducement, reward or benefit to any representative of the Buyer in relation to the RFP.

  ii. A Respondent who attempts to do anything prohibited by paragraphs 6.13.a. and d. and 6.15.a. may be disqualified from participating further in the RFP process.

  iii. The Buyer reserves the right to require additional declarations, or other evidence from a Respondent, or any other person, throughout the RFP process to ensure probity of the RFP process.

- ### Anti-collusion and bid rigging

  i. Respondents must not engage in collusive, deceptive or improper conduct in the preparation of their Proposals or other submissions or in any discussions or negotiations with the Buyer. Such behaviour will result in the Respondent being disqualified from participating further in the RFP process. In submitting a Proposal the Respondent warrants that its Proposal has not been prepared in collusion with a Competitor.

  ii. The Buyer reserves the right, at its discretion, to report suspected collusive or anti-competitive conduct by Respondents to the appropriate authority and to give that authority all relevant information including a Respondent's Proposal.

- ### Confidential Information

  iii. The Buyer and Respondent will each take reasonable steps to protect Confidential Information and, subject to paragraph 6.17.c. and without limiting any confidentiality undertaking agreed between them, will not disclose Confidential Information to a third party without the other's prior written consent.

  iv. The Buyer and Respondent may each disclose Confidential Information to any person who is directly involved in the RFP process on its behalf, such as officers, employees, consultants, contractors, professional advisors, evaluation panel members, partners, principals or directors, but only for the purpose of participating in the RFP.

  v. Respondents acknowledge that the Buyer's obligations under paragraph 6.17.a. are subject to requirements imposed by the Official Information Act 1982 (OIA), the Privacy Act 1993, parliamentary and constitutional convention and any other obligations imposed by law. The Buyer will not be in breach of its obligations if Confidential Information is disclosed by the Buyer to the appropriate authority because of suspected collusive or anti-competitive tendering behaviour. Where the Buyer receives an OIA request that relates to a Respondent's Confidential Information the Buyer will consult with the Respondent and may ask the Respondent to explain why the information is considered by the Respondent to be confidential or commercially sensitive.

- ### Confidentiality of RFP information

  1. For the duration of the RFP, to the date of the announcement of the Successful Respondent, or the end of the RFP process, the Respondent agrees to keep the RFP strictly confidential and not make any public statement to any third party in relation to any aspect of the RFP, the RFP process or the award of any Contract without the Buyer's prior written consent.

  2. A Respondent may disclose RFP information to any person described in paragraph 6.17.b. but only for the purpose of participating in the RFP. The Respondent must take reasonable

steps to ensure that such recipients do not disclose Confidential Information to any other person or use Confidential Information for any purpose other than responding to the RFP.

○ Costs of participating in the RFP process

i. Each Respondent will meet its own costs associated with the preparation and presentation of its Proposal and any negotiations.

○ Ownership of documents

a. The RFP and its contents remain the property of the Buyer. All Intellectual Property rights in the RFP remain the property of the Buyer or its licensors. The Buyer may request the immediate return or destruction of any or all RFP documents and any copies. Respondents must comply with any such request in a timely manner.

b. All documents forming the Proposal will, when delivered to the Buyer, become the property of the Buyer. Proposals will not be returned to Respondents at the end of the RFP process.

c. Ownership of Intellectual Property rights in the Proposal remain the property of the Respondent or its licensors. However, the Respondent grants to the Buyer a non-exclusive, non-transferable, perpetual licence to retain, use, copy and disclose information contained in the Proposal for any purpose related to the RFP process.

○ No binding legal relations

i. Neither the RFP, nor the RFP process, creates a process contract or any legal relationship between the Buyer and any Respondent, except in respect of:
   i. the Respondent's declaration in its Proposal
   ii. the Offer Validity Period
   iii. the Respondent's statements, representations and/or warranties in its Proposal and in its correspondence and negotiations with the Buyer
   iv. the Evaluation Approach to be used by the Buyer to assess Proposals as set out in Section 3 and in the RFP-Terms (as varied by Section 1, paragraph 1.6, if applicable)
   v. the standard RFP conditions set out in paragraphs 6.13 to 6.26
   vi. any other matters expressly described as binding obligations in Section 1, paragraph 1.6.

ii. Each exception in paragraph 6.21.a. is subject only to the Buyer's reserved rights in paragraph 6.23.

iii. Except for the legal obligations set out in paragraph 6.21.a. no legal relationship is formed between the Buyer and any Respondent unless and until a Contract is entered into between those parties.

○ Elimination

- The Buyer may exclude a Respondent from participating in the RFP if the Buyer has evidence of any of the following, and is considered by the Buyer to be material to the RFP:
  - the Respondent has failed to provide all information requested, or in the correct format, or materially breached a term or condition of the RFP
  - the Proposal contains a material error, omission or inaccuracy
  - the Respondent is in bankruptcy, receivership or liquidation

- the Respondent has made a false declaration
- there is a serious performance issue in a historic or current contract delivered by the Respondent
- the Respondent has been convicted of a serious crime or offence
- there is professional misconduct or an act or omission on the part of the Respondent which adversely reflects on the integrity of the Respondent
- the Respondent has failed to pay taxes, duties or other levies
- the Respondent represents a threat to national security or the confidentiality of sensitive government information
- the Respondent is a person or organisation designated as a terrorist by New Zealand Police.

Buyer's additional rights

c. Despite any other provision in the RFP the Buyer may, on giving due notice to Respondents:

1. amend, suspend, cancel and/or re-issue the RFP, or any part of the RFP
2. make any material change to the RFP (including any change to the timeline, Requirements or Evaluation Approach) on the condition that Respondents are given a reasonable time within which to respond to the change.

d. Despite any other provision in the RFP the Buyer may:

5 accept a late Proposal if it is the Buyer's fault that it is received late

6 in exceptional circumstances, accept a late Proposal where it considers that there is no material prejudice to other Respondents. The Buyer will not accept a late Proposal if it considers that there is risk of collusion on the part of a Respondent, or the Respondent may have knowledge of the content of any other Proposal

7 in exceptional circumstances, answer a question submitted after the Deadline for Questions, if applicable

8 accept or reject any Proposal, or part of a Proposal

9 accept or reject any non-compliant, non-conforming or alternative Proposal

10 decide not to accept the lowest priced conforming Proposal unless this is stated as the Evaluation Approach

11 decide not to enter into a Contract with any Respondent

12 liaise or negotiate with any Respondent without disclosing this to, or doing the same with, any other Respondent

13 provide or withhold from any Respondent information in relation to any question arising in relation to the RFP. Information will usually only be withheld if it is deemed unnecessary, is commercially sensitive to a Respondent, is inappropriate to supply at the time of the request or cannot be released for legal reasons

14 amend the Proposed Contract at any time, including during negotiations with a shortlisted Respondent

15. waive irregularities or requirements in or during the RFP process where it considers it appropriate and reasonable to do so.

e. The Buyer may request that a Respondent/s agrees to the Buyer:

7. selecting any individual element/s of the Requirements that is offered in a Proposal and capable of being delivered separately, unless the Proposal specifically states that the Proposal, or elements of the Proposal, are to be taken collectively
8. selecting two or more Respondents to deliver the Requirements as a joint venture or consortium.

New Zealand law

- The laws of New Zealand shall govern the RFP and each Respondent agrees to submit to the exclusive jurisdiction of the New Zealand courts in respect of any dispute concerning the RFP or the RFP process.

Disclaimer

i. The Buyer will not be liable in contract, tort, equity, or in any other way whatsoever for any direct or indirect damage, loss or cost incurred by any Respondent or any other person in respect of the RFP process.

ii. Nothing contained or implied in the RFP, or RFP process, or any other communication by the Buyer to any Respondent shall be construed as legal, financial or other advice. The Buyer has endeavoured to ensure the integrity of such information. However, it has not been independently verified and may not be updated.

iii. To the extent that liability cannot be excluded, the maximum aggregate liability of the Buyer, its agents and advisors is $1.

Precedence

1. Any conflict or inconsistency in the RFP shall be resolved by giving precedence in the following descending order:
    1. Section 1, paragraph 1.6
    2. Section 6 (RFP-Terms)
    3. all other Sections of this RFP document
    4. any additional information or document provided by the Buyer to Respondents through the Buyer's Point of Contact or GETS.
5. If there is any conflict or inconsistency between information or documents having the same level of precedence the later information or document will prevail.

Definitions

In relation to the RFP the following words and expressions have the meanings described below.

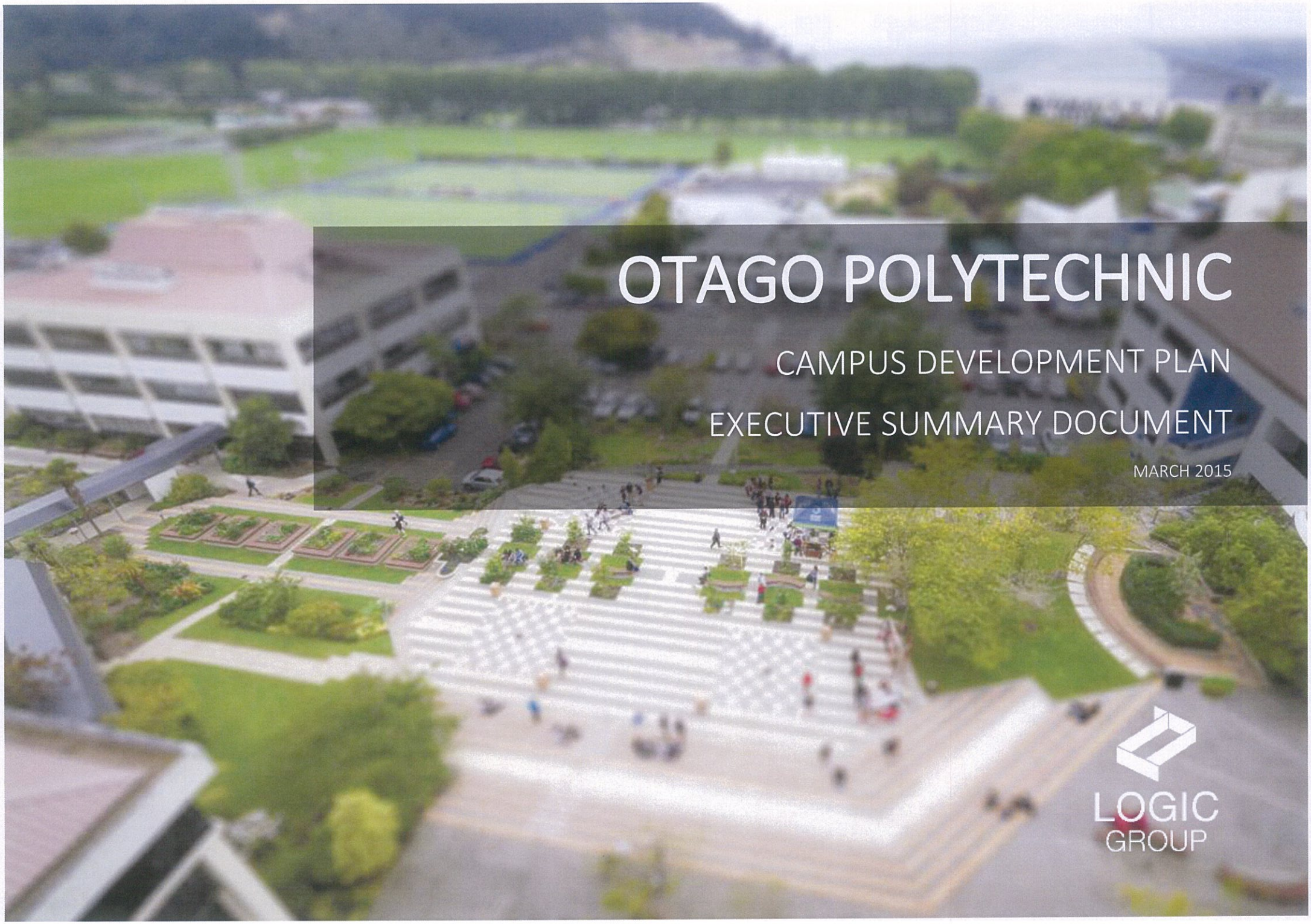
Advance Notice	A notice published by the buyer on GETS in advance of publishing the RFP. An Advance Notice alerts the market to a contract opportunity. Where used, an Advance Notice forms part of the RFP.

Business Day	Any week day in New Zealand, excluding Saturdays, Sundays, New Zealand (national) public holidays and all days from Boxing Day up to and including the day after New Year's Day.
Buyer	The Buyer is the government agency that has issued the RFP with the intent of purchasing the goods or services described in the Requirements. The term Buyer includes its officers, employees, contractors, consultants, agents and representatives.
Competitors	Any other business that is in competition with a Respondent either in relation to the goods or services sought under the RFP or in general.
Confidential Information	Information that: • is by its nature confidential • is marked by either the Buyer or a Respondent as 'confidential', 'commercially sensitive', 'sensitive', 'in confidence', 'top secret', 'secret', classified' and/or 'restricted' • is provided by the Buyer, a Respondent, or a third party in confidence • the Buyer or a Respondent knows, or ought to know, is confidential. Confidential information does not cover information that is in the public domain through no fault of either the Buyer or a Respondent.
Conflict of Interest	A Conflict of Interest arises if a Respondent's personal or business interests or obligations do, could, or be perceived to, conflict with its obligations to the Buyer under the RFP or in the provision of the goods or services. It means that the Respondent's independence, objectivity or impartiality can be called into question. A Conflict of Interest may be: **1.7.1** actual: where the conflict currently exists **1.7.2** potential: where the conflict is about to happen or could happen, or **1.7.3** perceived: where other people may reasonably think that a person is compromised.
Contract	The written Contract/s entered into by the Buyer and Successful Respondent/s for the delivery of the Requirements.
Contract Award Notice	Government Rules of Sourcing, Rule 45 requires a Buyer to publish a Contract Award Notice on GETS when it has awarded a contract that is subject to the Rules.
Deadline for Proposals	The deadline that Proposals are to be delivered or submitted to the Buyer as stated in Section 1, paragraph 1.2.
Deadline for Questions	The deadline for suppliers to submit questions to the Buyer as stated in Section 1, paragraph 1.2, if applicable.
Evaluation Approach	The approach used by the Buyer to evaluate Proposals as described in Section 3 and in Section 6 (as varied by Section 1, paragraph 1.6, if applicable).
GETS	Government Electronic Tenders Service available at www.gets.govt.nz

GST	The goods and services tax payable in accordance with the New Zealand Goods and Services Tax Act 1985.
Intellectual Property	All intellectual property rights and interests, including copyright, trademarks, designs, patents and other proprietary rights, recognised or protected by law.
Offer Validity Period	The period of time when a Proposal (offer) is held open by the Respondent for acceptance by the Buyer as stated in Section 1, paragraph 1.6.
Point of Contact	The Buyer and each Respondent are required to appoint a Point of Contact. This is the channel to be used for all communications during the RFP process. The Buyer's Point of Contact is identified in Section 1, paragraph 1.3. The Respondent's Point of Contact is identified in its Proposal.
Price	The total amount, including all costs, fees, expenses and charges, to be charged by the Successful Respondent for the full delivery of the Requirements. Each Respondent's Proposal must include its Price.
Proposal	The response a Respondent submits in reply to the RFP. It comprises the Response Form, the Respondent's bid, financial and pricing information and all other information submitted by a Respondent.
Proposed Contract	The Contract terms and conditions proposed by the Buyer for the delivery of the Requirements as described in Section 5.
RFP	Means the Request for Proposal.
Registration of Interest	A formal request by a Buyer asking potential suppliers to register their interest in a procurement. It is the first step in a multi-step tender process.
Request for Proposal (RFP)	The RFP comprises the Advance Notice (where used), the Registration of Interest (where used), this RFP document (including the RFP-Terms) and any other schedule, appendix or document attached to this RFP, and any subsequent information provided by the Buyer to Respondents through the Buyer's Point of Contact or GETS.
RFP-Terms	Means the Request for Proposal - Process, Terms and Conditions as described in Section 6.
RFP Process, Terms and Conditions (shortened to RFP-Terms)	The government's standard process, terms and conditions that apply to RFPs as described in Section 6. These may be varied at the time of the release of the RFP by the Buyer in Section 1, paragraph 1.6. These may be varied subsequent to the release of the RFP by the Buyer on giving notice to Respondents.
Requirements	The goods and/or services described in Section 2 which the Buyer intends to purchase.
Respondent	A person, organisation, business or other entity that submits a Proposal in response to the RFP. The term Respondent includes its officers, employees, contractors, consultants, agents and representatives. The term Respondent differs from a supplier, which is any other business in the market place that does not submit a Proposal.

Response Form	The form and declaration prescribed by the Buyer and used by a Respondent to respond to the RFP, duly completed and submitted by a Respondent as part of the Proposal.
Successful Respondent	Following the evaluation of Proposals and successful negotiations, the Respondent/s who is awarded a Contract/s to deliver all or part of the Requirements.

Appendix A – Otago Polytechnic Campus Development Plan – Executive Summary



OTAGO POLYTECHNIC

CAMPUS DEVELOPMENT PLAN

EXECUTIVE SUMMARY DOCUMENT

MARCH 2015

LOGIC GROUP

LOGIC
GROUP

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REPORT	REVISION	DATE	AUTHOR
OTAGO POLYTECHNIC – CAMPUS DEVELOPMENT PLAN	001	October 2014	S Pont
OTAGO POLYTECHNIC – CAMPUS DEVELOPMENT PLAN EXECUTIVE SUMMARY DOCUMENT	002	March 2015	S Pont

EXECUTIVE SUMMARY 01

Logic Group (Logic) have been appointed by Otago Polytechnic (OP) to complete a Campus Development Plan to assist informing a master plan for future development of the Forth Street and Albany Street Campus.

The purpose of this study is to identify co-location and future development synergies across individual schools to ensure any future development maximises collaboration benefit across the campus.

The original brief was to identify preferred locations for accommodating the following schools:

- Architecture, Building & Engineering, Natural Resources (AB&E)
- Art & Design
- Vet Nursing
- Nursing
- Midwifery
- Social Services
- Innovation Workspace
- Campus Services

A primary driver for this investigation was to consider options for vacating the existing L Block located on Anzac Avenue and currently occupied by AB&E. OP have a current land lease which is set for expiry by 30 June 2020. OP have acknowledged that the design and planning to enable this transition must start immediately to minimise impact on existing operation of schools and facilities.

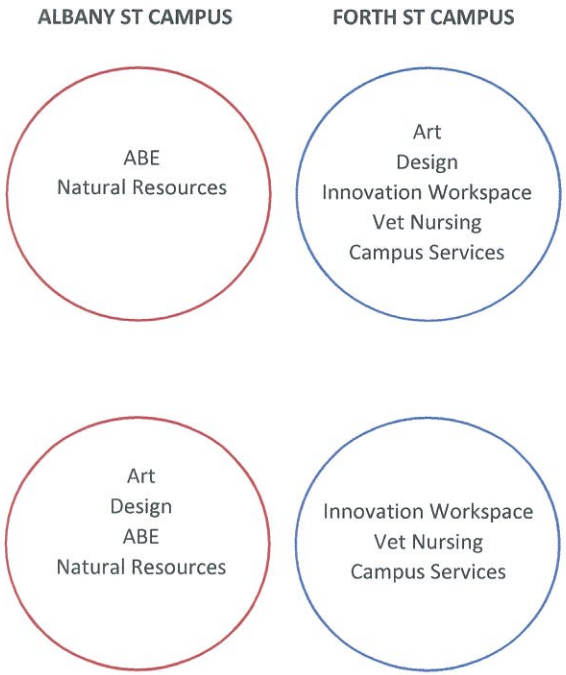
This report provides an update to the original Development Plan report dated October 2014. The original report assumed unencumbered development constraint on the Albany Street site (with the exception of O & P Blocks). Since completing the original investigation, Heritage New Zealand have notified their interest in the existing Albany Street site and their pending historic significance registration of the existing N Block and associated courtyards. Registration of this building may restrict future development on the Albany Street site and may impose strict conditions on demolition or modifications to the existing building.

Options One to Four have assumed that the existing N Block can be demolished, this enabling new development across the complete site. The alternative Option Five has assumed only partial demolition of N Block will be permitted and the existing N Block façade facing Albany Street will be retained.

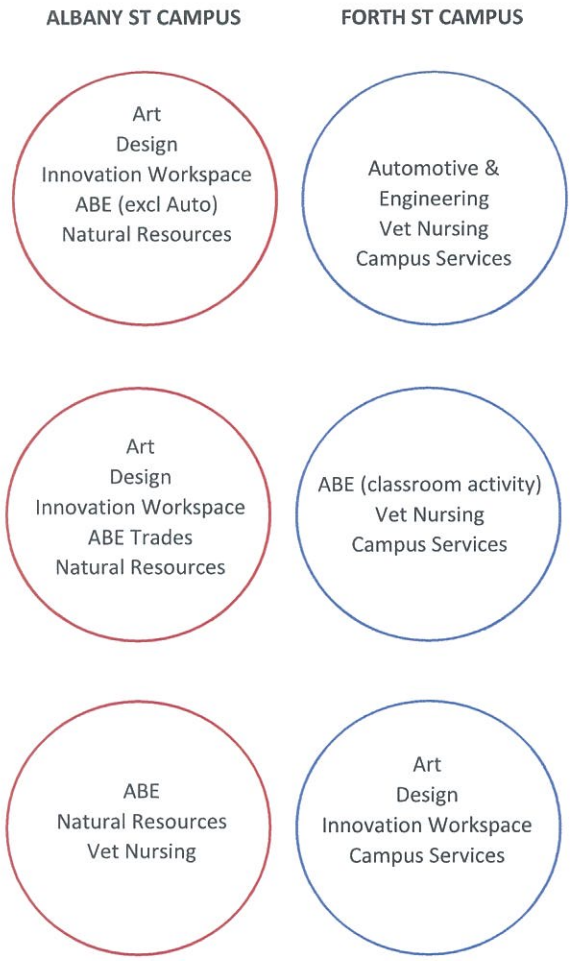
The tables on the following page summarise the various options that have been developed for relocation of Polytechnic Schools to either Forth Street or Albany Street.

Logic Group have completed a space utilisation study for each of the schools included in this study. Generally, global areas for each school could be reduced by a factor of approximately 10% of Gross Floor Area to take into consideration existing space utilisation and efficiencies gained through shared amenities, plant and infrastructure. The spatial plans and associated Rough Order Cost Budgets included in this Development Plan Report have assumed this general reduction in area across the Schools. Further analysis of space utilisation, existing areas and forecast areas is included in section 5.0 of this report.

OPTION SUMMARY //



OPTION ONE	Relocation of Art from the Albany Street campus into a new purpose built building shared with Design located on the Forth Street Campus. Relocation of Design from H Block into a new purpose built building shared with Art located on the Forth Street Campus. Relocation of ABE from A Block and L Block to the Albany Street Campus. Classroom based ABE activity to be accommodated in the existing P and O blocks and a new purpose built building is constructed for trade based activity (carpentry, automotive, engineering). Vet Nursing to be relocated and accommodated in A Block.
OPTION TWO	Art is retained in the existing P and O Blocks at the Albany Street campus. A new purpose built flexible building to accommodate overflow Art (ceramics, sculpture etc.) Design, and ABE Trades is constructed at Albany Street. Relocation of Design from H Block to the new shared and purpose built building at Albany Street. Relocation of ABE from L Block and Automotive Engineering from A Block to the new shared and purpose built building at Albany Street. Vet Nursing to be relocated and accommodated in A Block.



OPTION THREE	Art is retained in the existing P Block at the Albany Street campus. A new purpose built flexible building to accommodate overflow Art (ceramics, sculpture etc.) Relocation of Design from H Block to the new shared and purpose built building at Albany Street. Relocation of Innovation Workspace to an expanded O Block at Albany Street. Relocation of ABE from L Block to the new shared and purpose built building at Albany Street. Retention of Automotive & Engineering in A Block. Vet Nursing to be relocated and accommodated in A Block.
OPTION FOUR	Art is retained in the existing P and O Blocks at the Albany Street campus. A new purpose built flexible building to accommodate overflow Art (ceramics, sculpture etc.) Relocation of Design from H Block to the new shared and purpose built building at Albany Street Relocation of ABE trades from A Block and L Block to the new shared and purpose built building at Albany Street. ABE classroom based activities (non-workshop based) are relocated to A Block at the Forth Street Campus. Vet Nursing to be relocated and accommodated in A Block.
OPTION FIVE – NEW OPTION	Relocation of Art from the Albany Street campus into a new purpose built building shared with Design located on the Forth Street Campus. Sculpture, Ceramics, Textiles and model workshops to be located in A Block. Relocation of Design from H Block into a new purpose built building shared with Art located on the Forth Street Campus. Relocation of ABE from A Block and L Block to the Albany Street Campus. Classroom based ABE activity to be accommodated in the existing P and O blocks and a new purpose built building is constructed for trade based activity (carpentry, automotive, engineering). The existing P Block will be extended to accommodate a new administration and generic teaching spaces. Vet Nursing to be retained in N Block

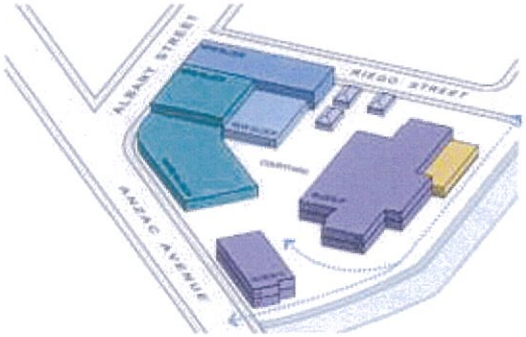
OPTION ONE

ALBANY ST CAMPUS

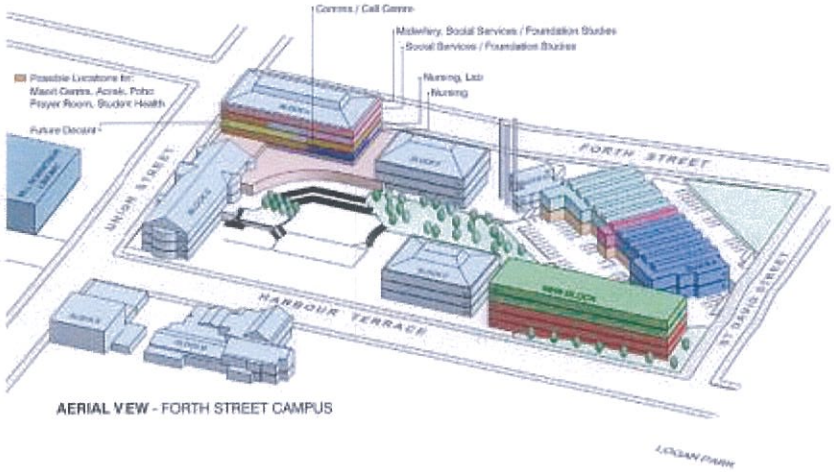
ABE
Natural Resources

FORTH ST CAMPUS

Art
Design
Innovation Workspace
Vet Nursing
Campus Services



AERIAL VIEW - ALBANY STREET CAMPUS



AERIAL VIEW - FORTH STREET CAMPUS

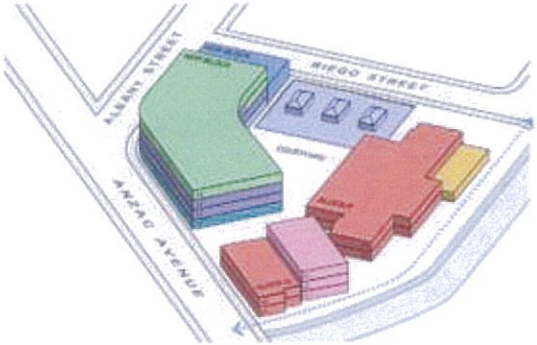
OPTION TWO

ALBANY ST CAMPUS

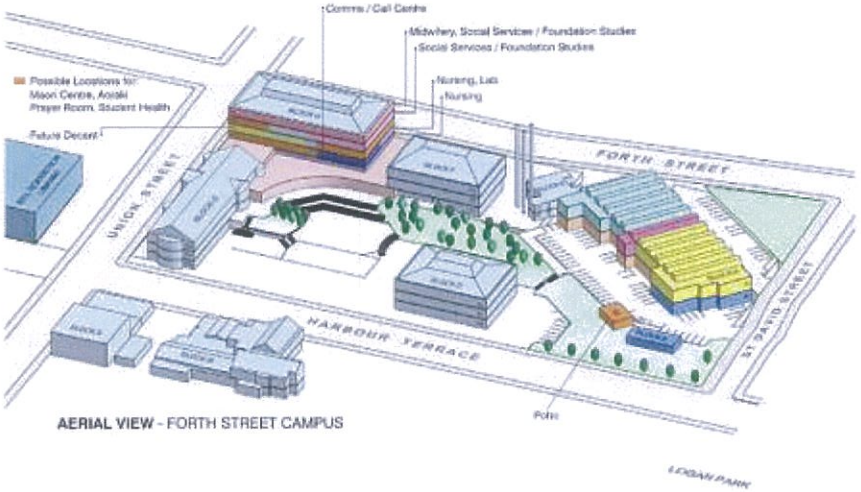
Art
Design
ABE
Natural Resources

FORTH ST CAMPUS

Innovation Workspace
Vet Nursing
Campus Services



AERIAL VIEW - ALBANY STREET CAMPUS



AERIAL VIEW - FORTH STREET CAMPUS

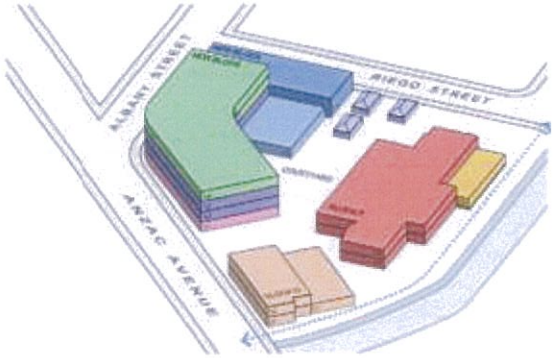
OPTION THREE

ALBANY ST CAMPUS

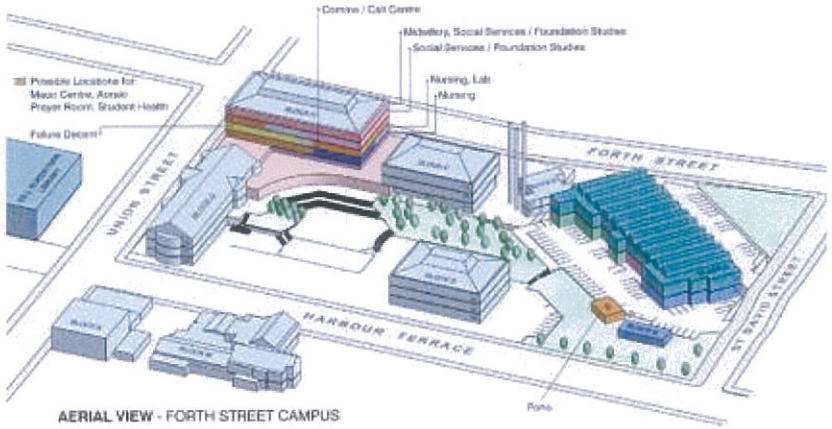
Art
Design
Innovation Workspace
ABE (excl Auto)
Natural Resources

FORTH ST CAMPUS

Automotive &
Engineering
Vet Nursing
Campus Services



AERIAL VIEW - ALBANY STREET CAMPUS



AERIAL VIEW - FORTH STREET CAMPUS

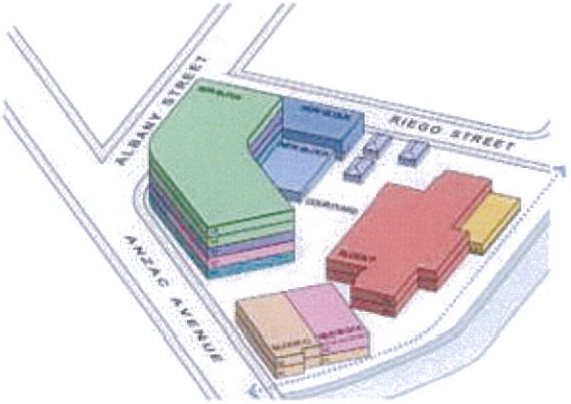
OPTION FOUR

ALBANY ST CAMPUS

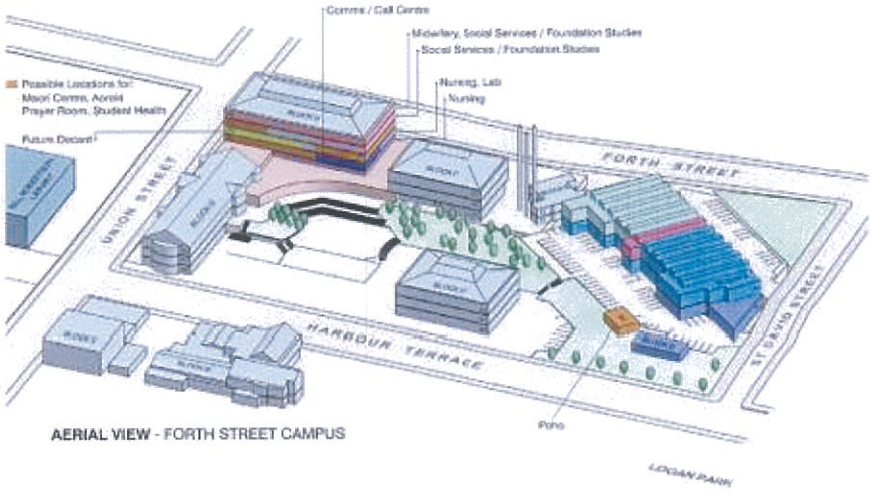
Art
Design
Innovation Workspace
ABE Trades
Natural Resources

FORTH ST CAMPUS

ABE (classroom activity)
Vet Nursing
Campus Services



AERIAL VIEW - ALBANY STREET CAMPUS



AERIAL VIEW - FORTH STREET CAMPUS

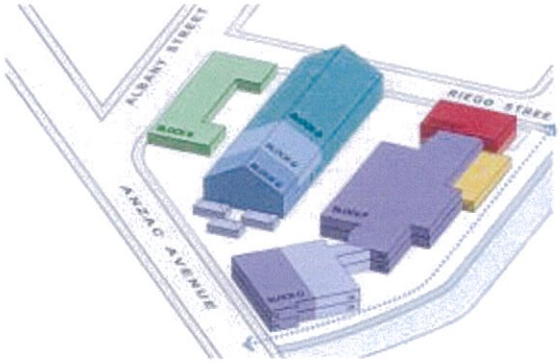
OPTION FIVE – NEW OPTION

ALBANY ST CAMPUS

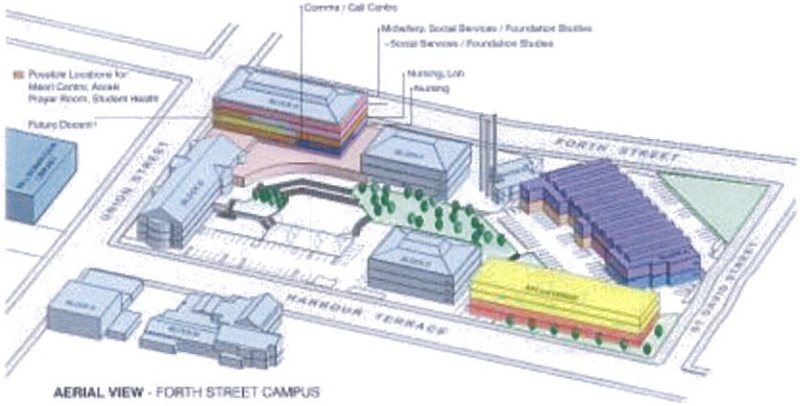
ABE
Natural Resources
Vet Nursing

FORTH ST CAMPUS

Art
Design
Innovation Workspace
Campus Services



AERIAL VIEW - ALBANY STREET CAMPUS



AERIAL VIEW - FORTH STREET CAMPUS

EXISTING LEASE HOLD INTERESTS //

Otago Polytechnic have total annual gross rents that equate to circa $335K. For each of the development options summarised these leases can be surrendered.

We note that a high proportion of this lease value ($159K) is for Otago Polytechnis ground lease obligations for 100 Anzac Ave (L Bock) which has a lease expiry of 30 June 2020. Otago Polytechnic believe this lease is going to increase significantly and a revised ground lease of circa $500K per annum is anticipated during the next lease term. On this basis if Otago Polytechnic were to retain existing lease arrangements, annual lease costs are estimated to be in the region of $675K.

In addition to the ground lease costs noted above, it is recognised that there will be a deferred maintenance budget required to maintain future infrastructure security at L Block. Campus Services estimate approximately $250K should be budgeted to allow for pending roof repairs, heating and boiler upgrades and general building maintenance at L Block should Otago Polytechnic choose to extend this lease.

On the basis that Otago Polytechnic choose to proceed with options one, two & three total annual lease costs of $675K per annum would be saved. In addition a one off capital cost of circa $250K would be saved by not needing to invest in deferred maintenance at L Block. In the event that Option Four was the preferred option, Annual Lease savings would be in the order of $620K, the differnce being retaining the existing lease at Harrow Street to accommodate Campus Services workshop and storage.

COST BENEFIT ANALYSIS //

A cost benefit analysis was completed for each of the various options.

A weighting has been allocated to each benefit and each option has been awarded a score of between 1 to 3 (1 = low benefit, 2 = moderate benefit, 3 = high benefit)

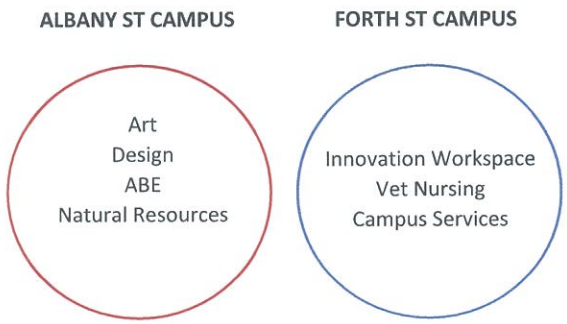
The weighting for each benefit is summarised as follows:

BENEFIT	WEIGHTING
Lowest capital cost	3
Highest annual savings through existing lease costs	1
Future space flexibility	4
Best connectivity and school synergy	5
Lease impact / disruption during development	3
Allows vacating of L Block prior to 2020	2

Total weighted scores and option ranking is summarised in the table below. A detailed analysis of this evaluation is included in section 11.0

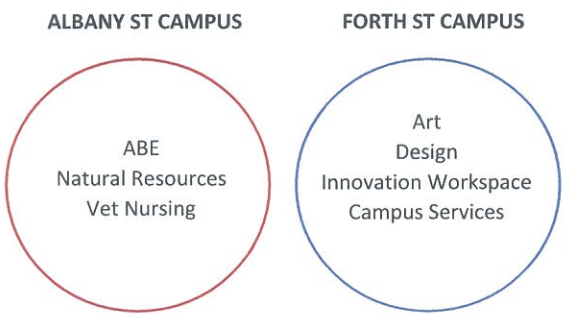
OPTION	TOTAL WEIGHTED SCORE	RANK
Option One	38	4
Option Two	48	1
Option Three	45	3
Option Four	27	5
Option Five – NEW OPTION	48	1

A detailed summary of the cost benefit analysis for options two and five are included on the following pages.



OPTION TWO //

BENEFIT	WEIGHTING	SCORE	WEIGHTED SCORE	COMMENTS
Lowest capital cost	3	1	3	Option has the second highest capital cost of all options. This option is approximately 15% higher than the cheapest option.
Highest annual savings through existing lease costs	1	3	3	Allows all external leases to be terminated and consolidated onto Otago Polytechnic owned property.
Future space flexibility	4	3	12	Provides future decant / flexible space within H Block and A Block.
Best connectivity and school synergy	5	3	15	Brings Art & Design and ABE together that will result in optimal flexibility for collaboration and synergy across schools.
Least impact / disruption during development	3	3	9	This option will have the least impact during construction.
Allows vacating of L Block prior to 2020	2	3	6	
			48	



OPTION FIVE //

BENEFIT	WEIGHTING	SCORE	WEIGHTED SCORE	COMMENTS
Lowest capital cost	3	2	6	This option is the mid-range cost option when compared to other options
Highest annual savings through existing lease costs	1	3	3	Allows all external leases to be terminated and consolidated onto Otago Polytechnic owned property.
Future space flexibility	4	3	12	Provides future decant / flexible space within H Block and good utilisation in A block
Best connectivity and school synergy	5	3	15	Brings Art & Design together and ABE together, however ABE and Art& Design are split over two campuses. This is not considered to be detrimental.
Least impact / disruption during development	3	2	6	This option will have moderate impact if developed in stages. Temporary accommodation for vet nursing and art, sculpture maybe required.
Allows vacating of L Block prior to 2020	2	3	6	Will allow vacation of L Block if Forth Street and Albany Street are developed concurrently.
			48	

DEVELOPMENT STAGING AND PROGRAMME //

One of the primary drivers for this project is to enable L Block to be vacated prior to June 2020 to enable the existing lease to be terminated without any future need for extension.

A strategic development programme is summarised in section 8.0 and note that vacation of L Block for each of the options identified on the basis that the Polytechnic proceed with the development in line with the following milestone summary.

1. **MASTERPLAN.** Development of a master plan based upon the preferred development strategy complete early 2015.
2. **DESIGN COMPETITION.** Facilitation of a design competition based upon the preferred master plan solution early 2015.
3. **DESIGN.** Progress design through to completion by end 2015.
4. **PROCUREMENT.** Procurement of the main contractor by competitive tender 1st quarter 2016.
5. **CONSTRUCTION.** Commence construction of enabling works / decanting 1st quarter 2016. Followed by Stage One construction 2nd quarter 2016.

Each of the options identified can achieve the milestones noted above subject to approval to proceed being provided by OP during 2nd quarter 2015.

Appendix B – Otago Polytechnic Connectivity Strategy

PROPOSAL FOR CAMPUS DESIGN.
CONCEPT DESIGN.

12 AUGUST 2015

TOBIAS DANIELMEIER
ALBERT DUDEK
JOLIN YU
RICHA SHAH

DESIGN BRIEF

- Strengthen the **connection** between campus on both sides of Harbour Terrace
- OP campus design to **link** to DCC strategy
- **Prioritise pedestrians** on Harbour Terrace by changing the street from a connector road to a local road.
- Promote **unique character** areas within the core precinct street network and provide interventions that **maximize open space** opportunities, **foster engagement and a sense of ownership**.
- Increase the functionality of the space for users to **diversify** their **interactions**.
- Define the Tertiary Precinct promoting a **sense of belonging** while **enhancing identity** and reinforcing **local context**.
- Landscape design to maximize the **aesthetical beauty** of the area and **ecological values** linking to the **living campus**.
- Encourage various modes of transport by providing abundant bicycle racks.
- Provide exhibition space that **showcases work** undertaken at Otago Polytechnic.

EXISTING CAMPUS

Deciduous trees

- Cluttered appearance

Gravel Walkway

- Not easy to maintain
- Not a functional walkway

Existing plants and bush

- Some not visually appealing
- Hard to maintain, untrimmed look
- Disorganized arrangement

Minimum bicycle ranks

Outdated timber benches

Insufficient lighting (plinths)

SITE ANALYSIS

- Harbour Terrace separates M and S Block from the rest of the campus
- Harbour Terrace is not prioritizing pedestrians' needs
- Speed of cars traveling on Harbour Terrace
- Car park that takes up campus area
- Small green area between car park and campus
- Minimum link between M Block at rest of campus (pedestrian crossing)
- Few functions of space
- A sense of identity is not strongly indicated
- No dedicated space for recreation or art

DESIGN PROPOSALS BY CHOW:HILL

HIGH INVESTMENT PROPOSAL

TACTICAL TRIAL PROPOSAL

DAYLIGHT STUDY

VISION + STRATEGIES

MOVEMENT

PARK BOULEVARD

LINEAR PARK

LIVING CAMPUS

MIXED ACTIVITIES

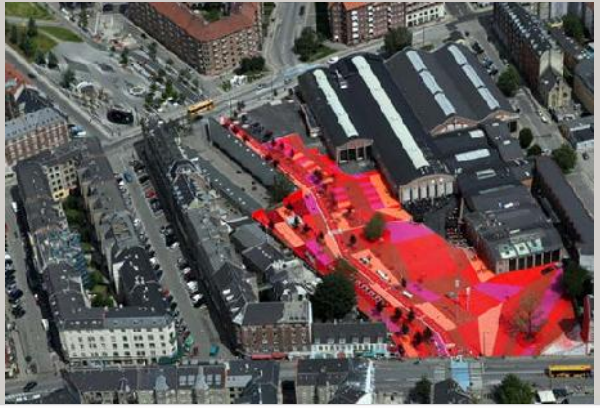
ARTS + RECREATION

SOCIAL + ENTERTAINMENT

DAY / NIGHT

CAMPUS CARPET INSPIRATION

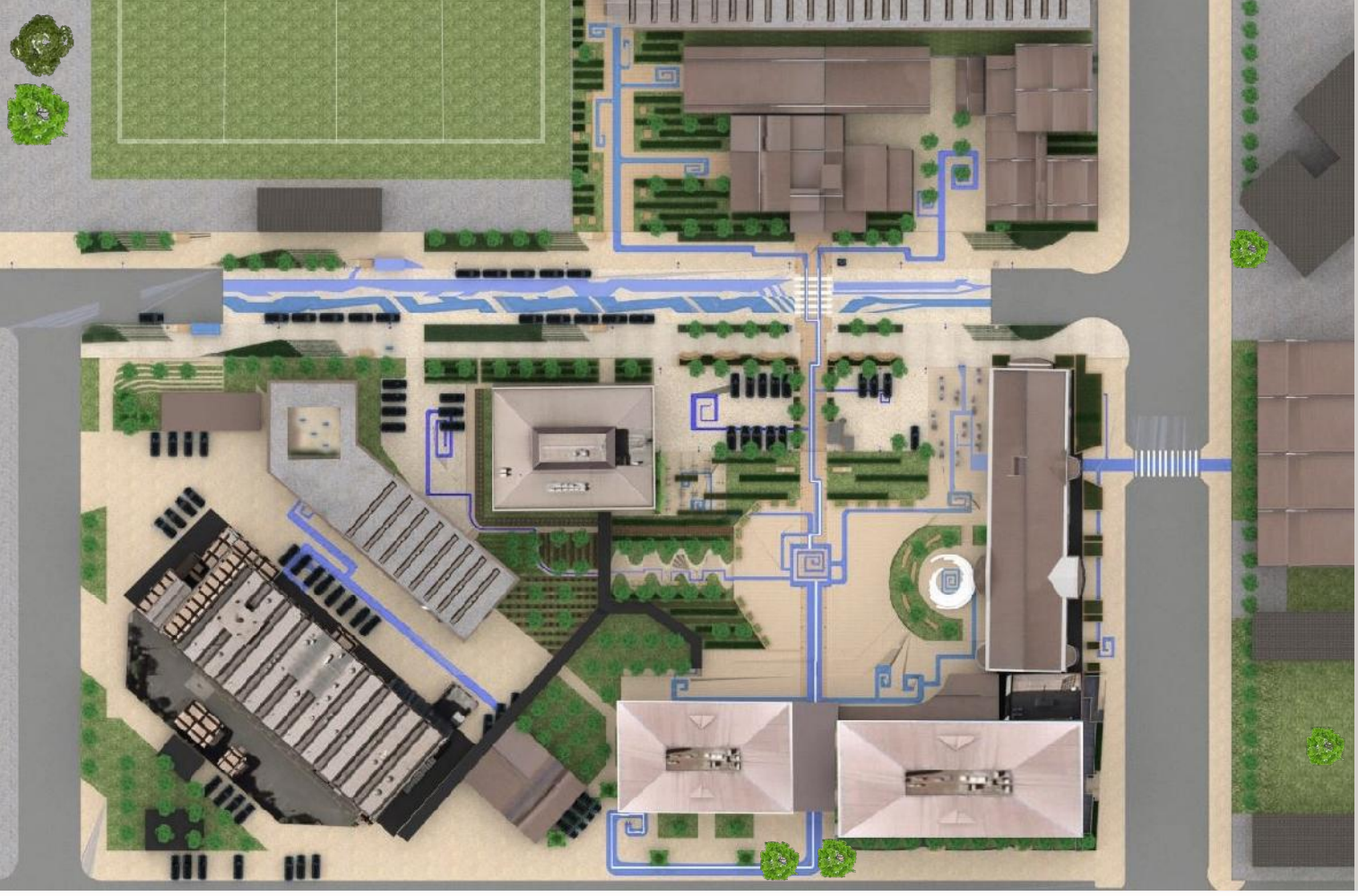
- Visual links on the campus floor that establish physical links between buildings.
- The purpose is to create an inclusive environment that adds to the identity of the campus.
- As seen in Superkilen park, the bright red carpet and white lines distinguish the space from the rest of the city.
- Intended to celebrate diversity, the park is filled with objects from around the world, covering over 50 nationalities.
- Strengthens connection, enhances identity, promotes unique character, defines tertiary precinct area



SONNENHOF CARPET DESIGN

The office and residential building design in Jena, Germany creates an environment between buildings that is highly connected and strengthens the identity of the complex.

The outdoor facilities continue the building's overall design concept past the edges of the lot. The flexible pattern in use integrates itself conceptually into the surroundings.

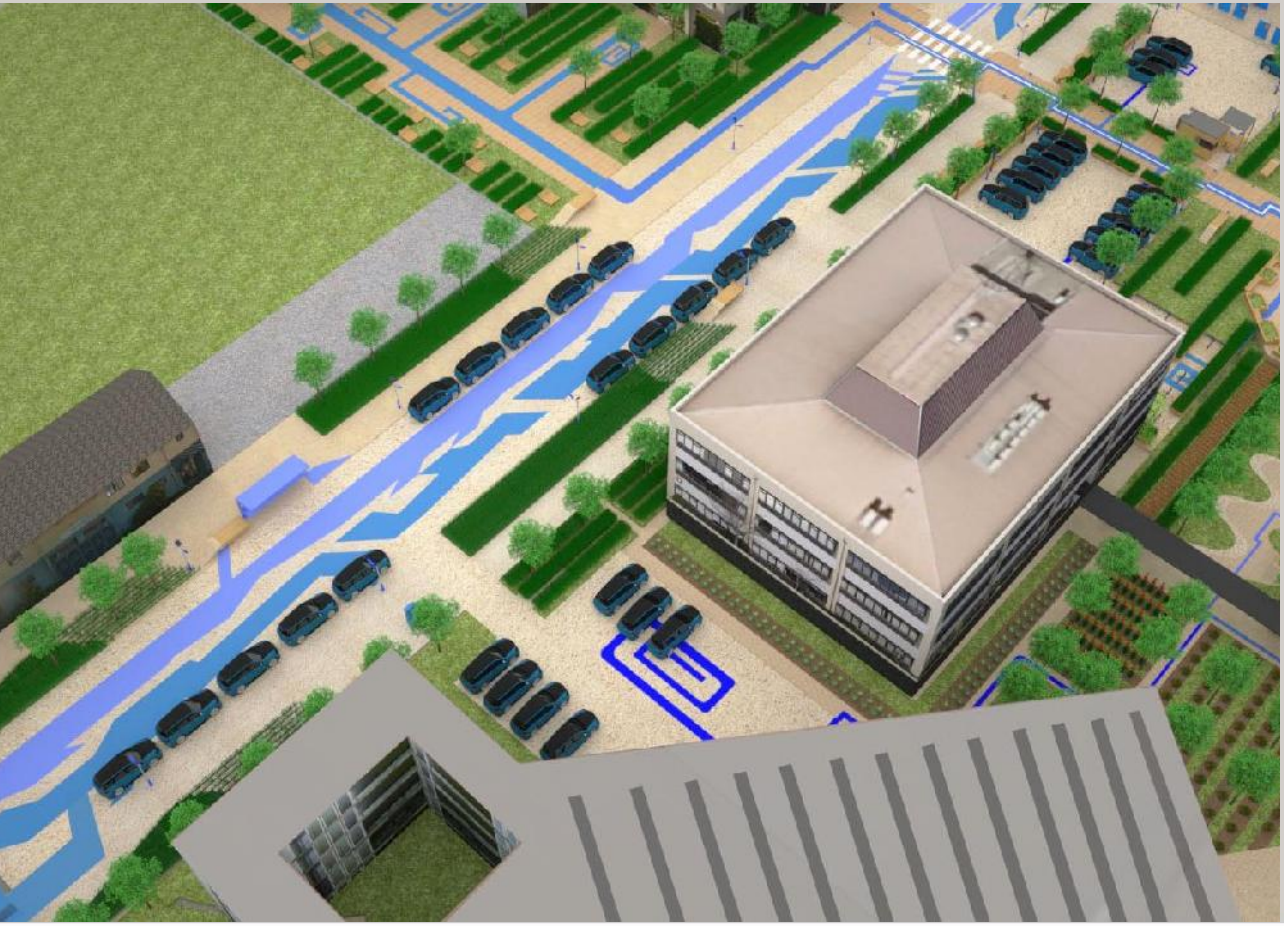


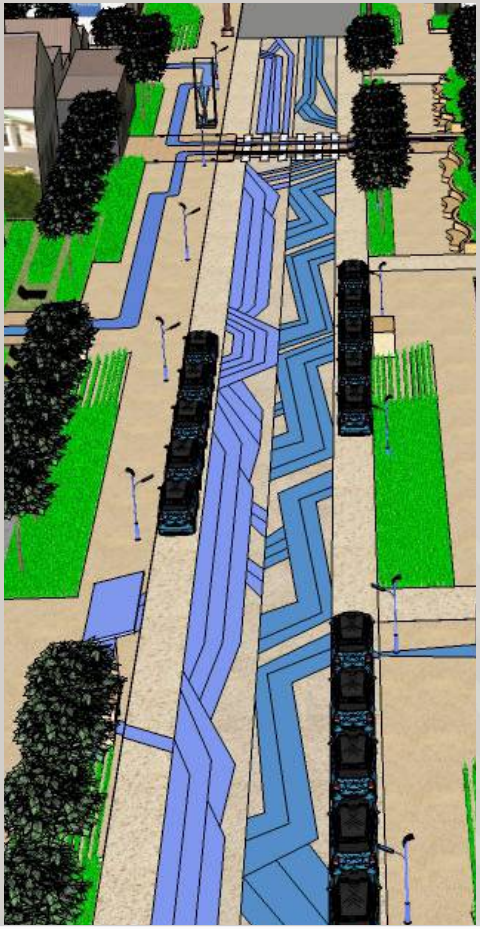
BLUE CARPET DESIGN

CAMPUS LINK

ROAD DESIGN

- Inspired by Lang-Baumann design intended to emphasize pedestrians.
- By using contrasting colours the perception of the road can be transformed and manipulated.





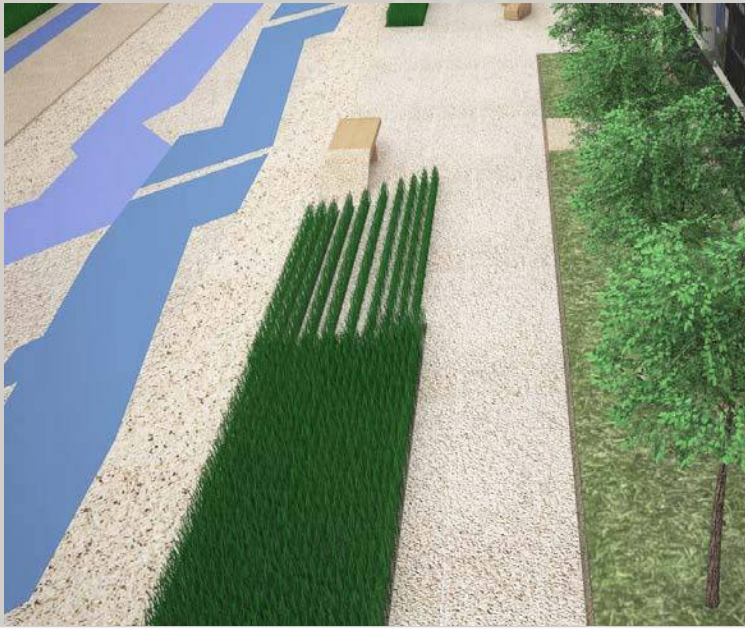
LOCAL ROAD DESIGN

HIGHLINE INSPIRATION

Completed on an outdated railway line in New York City, the Highline Project exhibits a linear park with green space alongside a walkway. The project essentially link to the wider DCC strategy, prioritises pedestrians, encourages interactions, maximises open space utilisation, man-made landscape

LINEAR PARK DESIGN

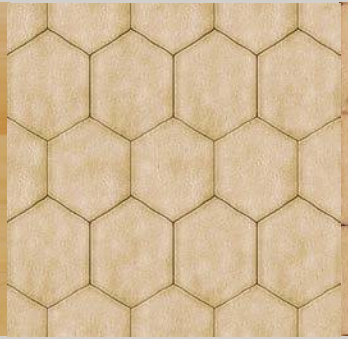
LANDSCAPING



MATERIALS & COLOURS

Matai Timber

Colour campus area



Colour for walkways

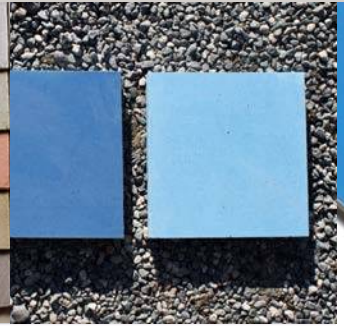
Colour for road

Pre-cast concrete for pavement

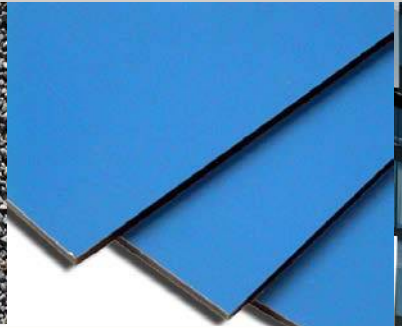
Cobalt Blue

Coloured concrete

Samples



Alucobond panels



Alucobond panels for info boards

ENTRANCE GATES

- A gate can be considered a type of passageway and identifies the entrance to a defined area.
- A gate can help to generate a sense of identity as well as adding to the local context of the place.
- The Maori Gate represents a welcome post that greets each visitor and user as they enter the campus.
- Enhances identity and local context, strengthens connection, unique character, defines tertiary precinct area




DUNEDIN CAMPUS ENTRANCE GATE

BUS SHELTER DESIGN

CAMPUS SIGNAGE

Adding campus signage

Three languages should be occurred on the board

- English language
- Te Reo
- Braille language

To ensure consistency and legibility, sign messages are standardized, including:

- Otago Polytechnic name and LOGO
- Campus map
- Faculties or building information
- Arrow of direction
- Location

LIVING CAMPUS

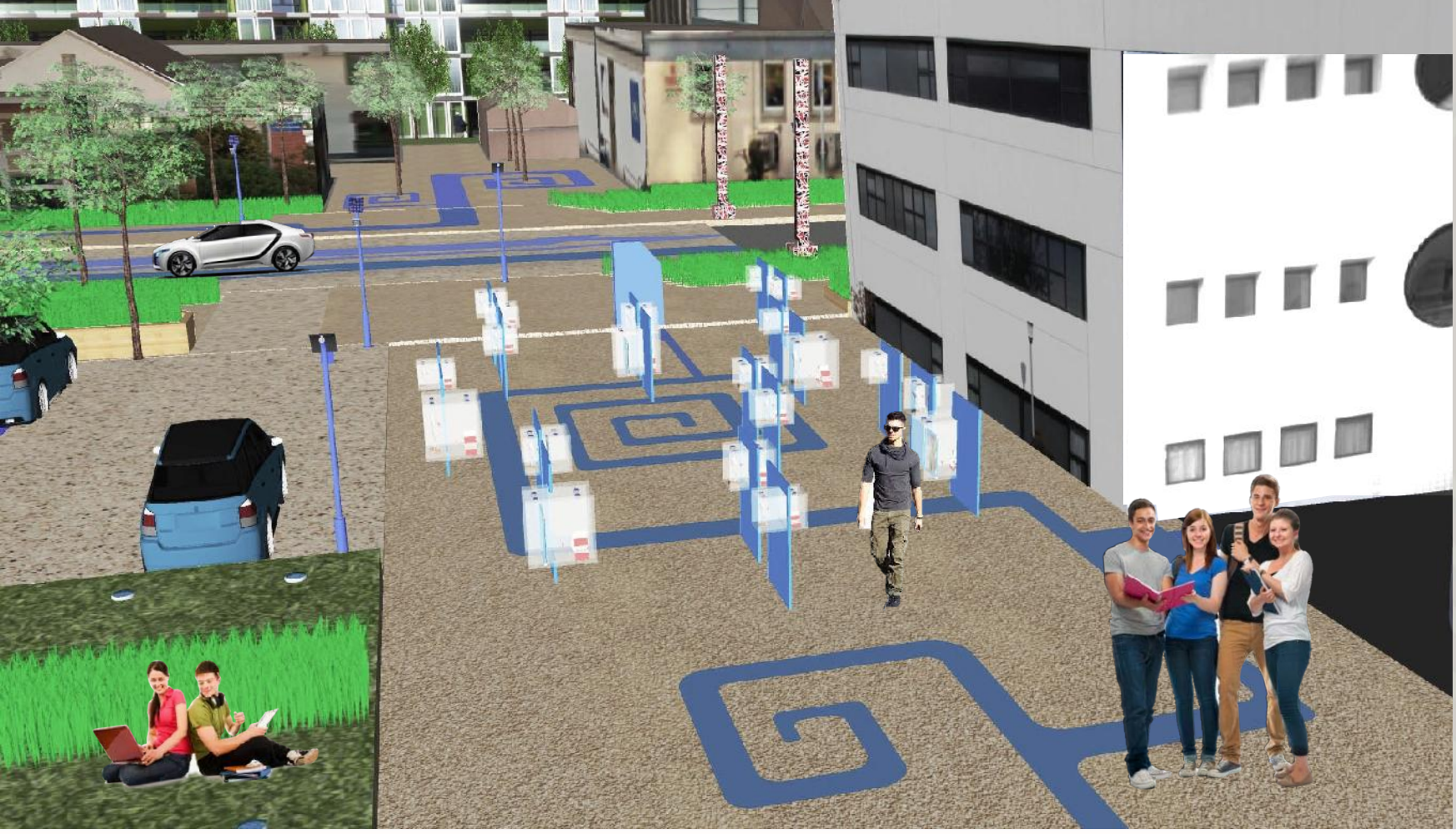
ENTERTAINMENT / ACTIVITIES

Design outdoor spaces that invite students, faculty, staff and community members to connect and engage through the campus and in select open areas. The goal is to create beautiful spaces that foster activity, connectivity and creativity.

- Using the existing steps (in front of H block) to serve as seating
- Paver patterns make up one stage
- Hosting activities such as music venues, art displays, fairs, community + education events
- Include a ramp for wheelchair access
- Studio 56

CAMPUS SQUARE

OUTDOOR CLASSROOM

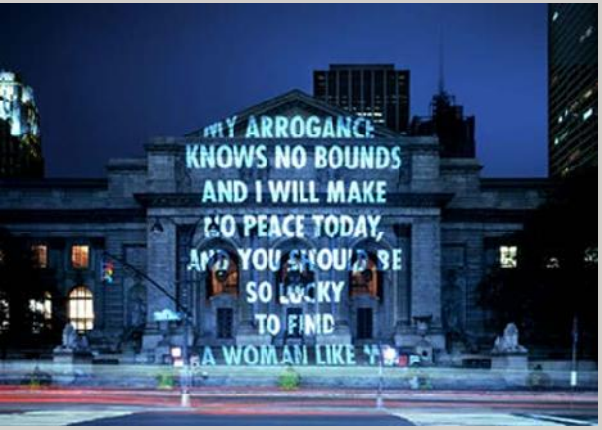


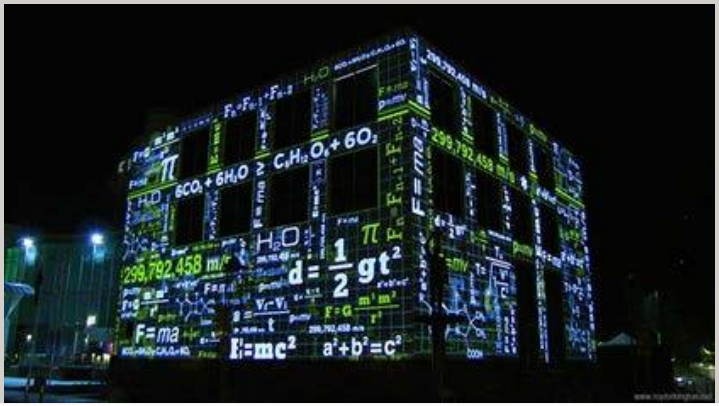
WORK & ART SHOWCASE

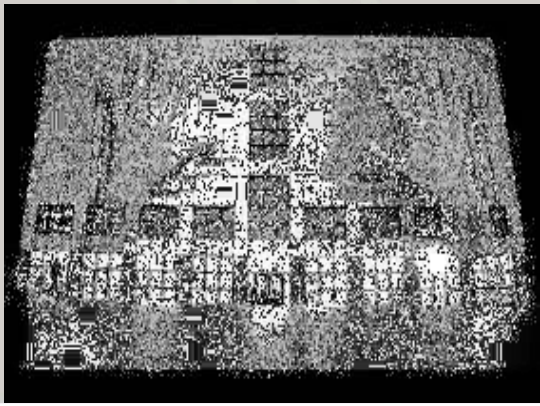
FLUSH RECESSED BLUE UP-LIGHTS

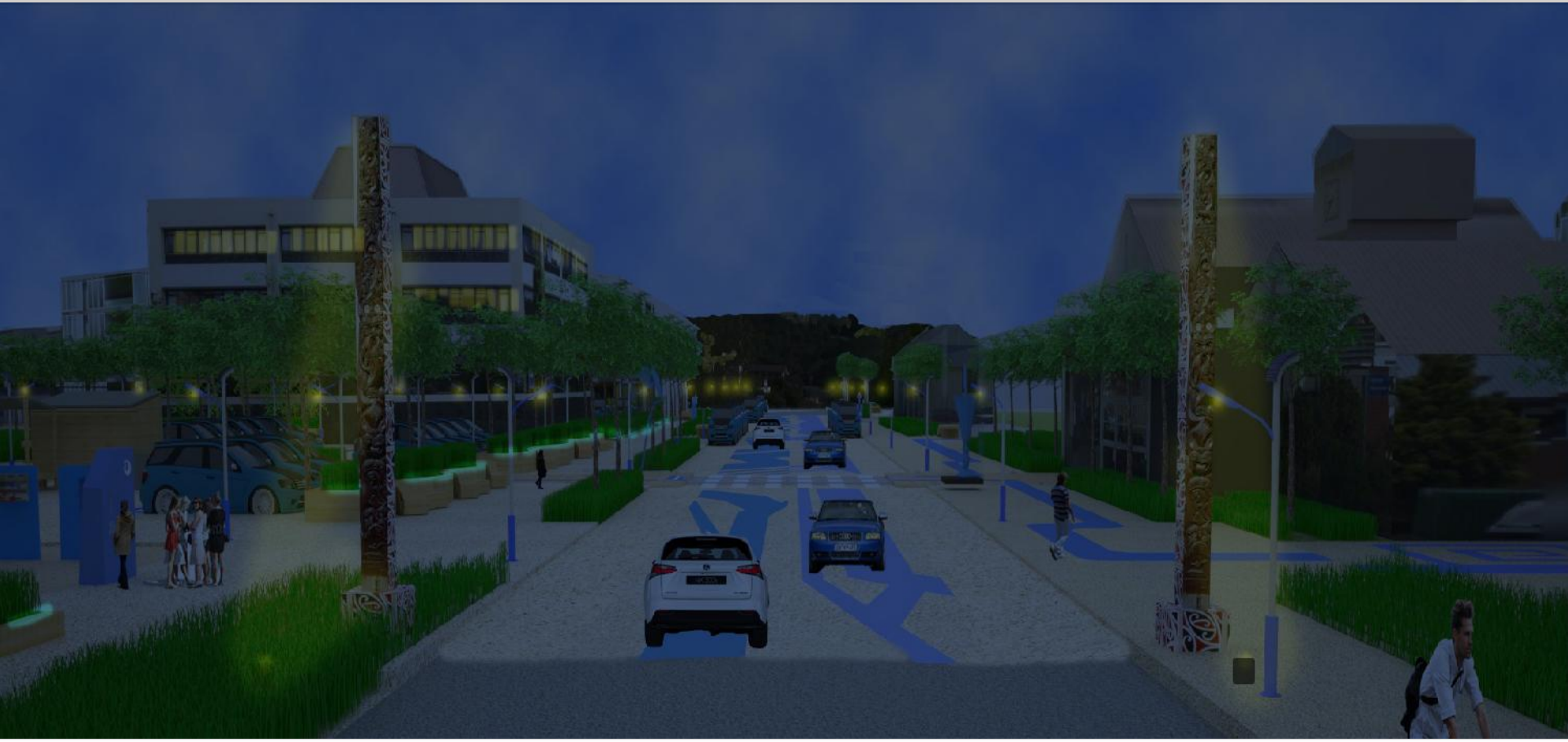
LIGHTING / IDENTITY STUDIES

LIGHT ART PROJECTION



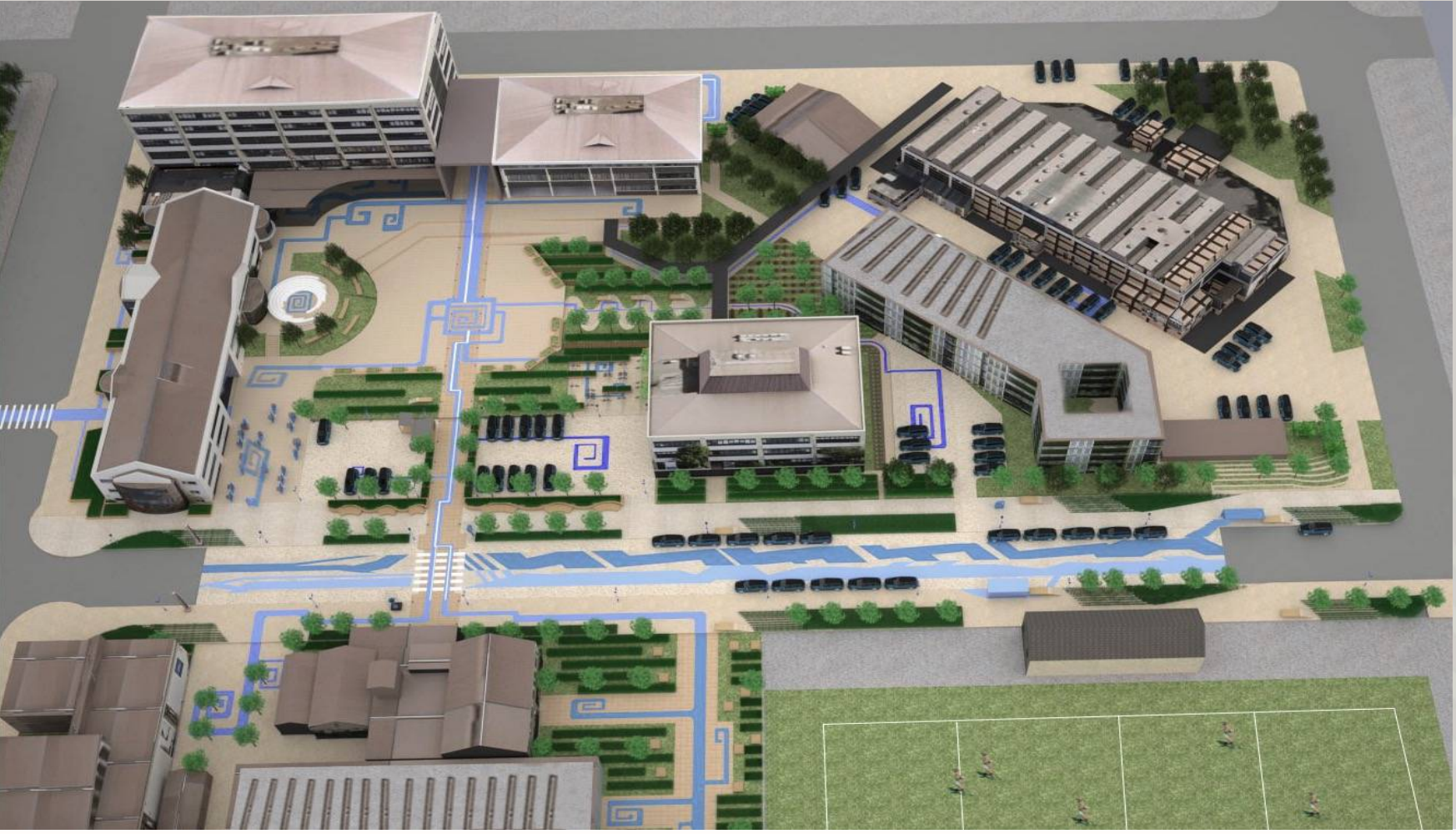







THE GREATEST
PLEASURE IN LIFE


THE GREATEST
PLEASURE IN LIFE IS
DOING WHAT
PEOPLE SAY YOU
CANNOT DO.
WALTER BAGEHOT



OTAGO POLYTECHNIC

Appendix C – Architectural Scope of Services

Design Documentation Guidelines Architecture

Concept Design Phase

Design Process

Inputs:

- Client brief, including budget and time schedule. ☑
- Client advice in respect to structure of design process. ☑
- Data collection including: ☑
  - topographical survey. ☑
  - existing structures and services. ☑
  - certificate of title. ☑
  - other legal information. ☑
  - geotechnical information. ☑
  - as-built measure of existing structures where additions or alterations are involved. ☑
  - engineering reports on existing structures. ☑
  - district plan rules and objectives including any existing resource consent, LIM and PIM. ☑
  - other design constraints. ☑

Tasks:

- Attend regular design phase meetings with relevant parties. ☑
- Inspect site and prepare site analysis. ☑
- Prepare schedule of accommodation. Agree with client. Distribute. ☑
- Prepare document register. ☑
- Inspect the site and prepare site analysis diagrams. ☑

Deliverables

- Agreed design brief and schedule of accommodation. ☑
- Report on existing facilities and engineering systems if applicable. ☑
- Options studies report. ☑
- Conceptual drawings including: ☑
  - overall site plan. ☑
  - floor plans. ☑
  - elevations. ☑
  - sketches. ☑
  - sections (indicative sufficient to illustrate overall concept). ☑
- Model. → NOT REQUIRED ☒
- Preliminary cost estimate (prepared by quantity surveyor). ☑
- Concept schedule of materials and finishes. ☑

+ PREPERATION OF RETHINK BRIEF + OTHER SERVICES AS DEFINED IN THE RFP.

Commentary

1. Confirm conditions of engagement at outset of commission.
2. Note that the preparation of brief is not part of architect's standard service.
3. Agree roles and responsibilities for all participants in building procurement process particularly responsibility for obtaining resource consents.
4. Agree with client the requirements and programme for client information and approvals.
5. Costing may be only on square metre rate basis - quantity surveyor should provide concept cost plan to accompany deliverables.
6. Concept and preliminary design phases may be combined.
7. The approved design may be submitted for a PIM at this stage to identify resource consent issues and to obtain existing conditions/services information.
8. Agree the scale of drawing deliverables for each phase according to project type.
9. Dimensioning and coordination is often the responsibility of the architect but this will vary with commission.
10. Advise client on the advantages in maintaining consultant advice at every stage, and the risks incurred where this is not commissioned.

Design Documentation Guidelines Architecture

Concept Design Phase continued

Design Process	Deliverables	Commentary
• Discuss and agree with client the additional separate or sub consultants that are to be retained and by whom, i.e., geotechnical consultant, surveyor, planning consultant, civil, structural, fire, services and acoustic engineers; quantity surveyors, interior designer, landscape architect, specialised project management services, health and safety consultant, others. ☑		11. If a partial service is commissioned, confirm whether the deliverables for the commissioned phase are affected. 12. Confirm with the client whether design management services are included in the design commission, or whether another party will manage the design process. 13. It may be necessary to obtain from the services engineer a schedule of notional requirements. 14. Refer to separate coordination checklist documents.
• Select and recommend to client appointment of other consultants or sub-consultants: confirm fees. ⊟		
• Identify responsibility for dimensional control. ☑		
• Identify responsibility for design coordination. ☑		
• Identify responsibility for design management. ☑		
• Investigate district plan requirements, analyse, review with client. ☑		
• Prepare formal/functional diagrams, develop viable options review with client. ☑		
• Analyse brief against design constraints ☑		
• Prepare concept design. ☑		
• Study siting options and climatic influences; develop massing models; evaluate relationships to site context. ☑		
• Test massing options against preferred functional arrangement and brief; review with client. Select model. ☑		
• Evaluate provisional concepts for accommodation of systems with structural engineer and building services engineer. ☑		

Design Documentation Guidelines Architecture

Concept Design Phase continued

Design Process	Deliverables	Commentary
• Evaluate provisional concepts for accommodation of parking and traffic requirements. ☑		
• Prepare architecture concept drawings. ☑		
• Prepare feasibility report. ☑ → TO BE DEVELOPED WITH INPUT OF PM + Q.S.		
• Prepare concept schedule of internal and external materials and finishes, confirm with client, distribute to quantity surveyor. ☑		
• Check disabled access requirements. ☑		
• Check concept against planning and survey requirements. ☑		
• Review concepts for significant health and safety risks relevant to the design. ☑		
• Review scheme with territorial authority planners. ☑		
• Liaise with quantity surveyor to prepare concept design cost estimate. ☑		
• Check concept design for conformity with fire and egress requirements. ☑		
• Establish provisional beam depths, duct crossovers and floor-to-floor heights. ☑		
• Establish energy conservation design criteria. ☑		
• Prepare energy study. ☑		
• Determine if environmental studies are required. If so, prepare and submit. ☑		
• Coordinate all design information between disciplines. ☑		

Design Documentation Guidelines Architecture

Preliminary Design Phase

Design Process

Inputs:

- Client approval of concept design. ☑
- Approved concept cost plan. ☑
- Confirmed site topographical, geotech and legal surveys. ☑
- Confirmed district plan analysis and development rules. ☑
- Concept civil and structural engineering constraints. ☑
- Concept services engineering and infrastructural constraints. ☑
- Concept fire engineering. ☑
- Concept environmental studies. ☑
- Concept acoustic advice. ☑
- Project time schedule. ☑

Tasks:

- Attend regular design phase meetings with relevant parties . ☑
- Revise preliminary design brief from concept design including all up to date information; confirm with client. ☑
- Update document register. ☑
- Develop list of questions affecting preliminary design pertinent to each external discipline; circulate. ☑

Deliverables

Drawings:

- Overall site plan. ☑
- Floor plans. ☑
- Elevations. ☑
- Sections. ☑
- Sketches/perspectives exterior. ☑
- Sketches/perspectives interior. ☑
- Model(s). → 3D Model ☑
- Materials and finishes presentation. ☑
- Other defined marketing material. ☑

Specifications:

- Preliminary schedule of internal and external materials and finishes. ☑

Reports:

- Updated design brief, schedule of accommodation and project time schedule. ☑
- Schedule of areas (net and gross as applicable) ☑
- Design features (options) report (with recommended option to take to developed design). ☑

Commentary

1. Consultation with territorial authority is recommended on key aspects of the design that may be considered outside the 'Acceptable Solution' regime, and unusual/contentious issues.
2. Cost estimates at this stage generally cannot be on a full elemental basis, as secondary elements are not well defined, but ensure independent professional cost advice is provided to the client.
3. Contribution to value management sessions may be required.
4. Preliminary design may provide a level of documentation appropriate for a Resource Consent application for less complex projects.
5. It may be relevant to review structural engineer's preliminary report and effect on external façade systems, including deflections, seismic impact, and weathering implications.

Design Documentation Guidelines Architecture

Preliminary Design Phase continued

Design Process	Deliverables	Commentary
• Review preliminary design for significant or unusual health and safety risks the design may present during construction and maintenance. ☑ • Prepare preliminary design work time schedule. ☑ • Review town planning analysis and implications. ☑ • Establish primary reference grids and dimensions. ☑ • Evaluate provisional concepts for accommodation of structural systems with structural engineer. ☑ • Evaluate provisional concepts for accommodation of services systems with building services engineer. ☑ • Revise schedule of internal and external materials and finishes; evaluate lifecycle durability and maintenance implications; confirm with client and submit to quantity surveyor. ☑ • Confirm compliance with fire and egress requirements. ☑ • Confirm compliance with disabled access requirements. ☑ • Confirm compliance with sanitary facilities code. ☑ • Confirm compliance with development rules. ☑ • Confirm revisions; request updated cost plan from quantity surveyor. ☑ • Establish provisional lift shaft sizes, air duct sizes, raised floor requirements, plant room sizes/mechanical requirements, egress requirements. ☑	• Outline of elements not covered in preliminary design. ☑ • Define assumed construction methodology governing design. ☑ • Highlight 'significant' or unusual buildability and health and safety issues. ☑ • Highlight 'special' project risks. ☑ • Report on façade options and weathering issues. ☑ + OTHER DELIVERABLES AS DEFINED IN THE RFP.	

Design Documentation Guidelines Architecture

Preliminary Design Phase continued

Design Process	Deliverables	Commentary
• Prepare architectural preliminary design drawings. ☑		
• Determine if specific town planning studies are required; prepare and submit. ☑		
• Review with town planner and territorial authority personnel for advice/comment. ☑		
• Review design with client's marketing/real estate advisors, including plan for presentation materials. ☑		
• Co-ordinate all design information between disciplines. ☑		

Design Documentation Guidelines Architecture

Developed Design Phase

Design Process

Inputs:

- Client approval of preliminary design. ☑
- Client approval of preliminary cost plan. ☑
- Client approval of feasibility report. ☑
- Reviewed and revised preliminary design. ☑
- District plan analysis. ☑
- Preliminary civil/structural engineering. ☑
- Preliminary services engineering and infrastructural constraints. ☑
- Preliminary fire engineering. ☑
- Preliminary environmental studies. ☑
- Preliminary acoustic advice. ☑
- Preliminary drawing register. ☑
- Current project programme ☑

Tasks:

- Attend regular design phase meetings with relevant parties. ☑
- Update developed design brief; confirm with client. Distribute. ☑
- Update document register. ☑
- Review each sub-consultant's and other consultant's schematics to architectural, verify match. ☑

Deliverables

Drawings:

- Overall site plan including parking/landscaping. ☑
- Floor plans (dimensioned). ☑
- Elevations (confirmed floor-to-floor heights). ☑
- Sections. ☑
- Sketches of critical and typical details. ☑
- Perspective. ☑
- Typical reflected ceiling plans. ☑

Specifications:

- Developed schedule of internal and external materials and finishes. ☑

Reports:

- Updated design brief, schedule of accommodation and project programme. ☑
- Revised schedule of areas (net and gross as applicable). ☑
- Updated design features (options) report (with recommended option to take to detailed design), including serviceability issues ☑
- Outline of elements not covered in developed design. ☑

Commentary

1. Cost estimates at this stage can be produced by quantity surveyor on elemental basis, with secondary elements estimated on typical details.
2. Developed design generally provides the minimum level of documentation to clearly define the scope of all architectural elements.
3. Developed design generally provides the minimum level of documentation appropriate for a resource consent application for complex projects.
4. Refer to separate co-ordination checklist documents.

Design Documentation Guidelines Architecture

Developed Design Phase

Design Process	Deliverables	Commentary
• Verify that all questions from the preliminary design brief relating to engineering disciplines have been resolved. ☑	• Define assumed construction methodology governing design. ☑	
• Verify significant or unusual health and safety issues have been addressed in the design. ☑	• Highlight significant or unusual buildability and health and safety issues. ☑	
• Confirm any revisions to preliminary cost plan. ☑	• Highlight weathering/façade issues. ☑	
• Confirm primary reference grids datum and dimensions. ☑	• Highlight 'special' project risks. ☑	
• Check preliminary internal and external finishes schedule; revise if necessary. Distribute. ☑	• Material/colour boards. ☑	
• Prepare architectural developed design drawings incorporating amendments into plans, elevations and sections. Distribute. ☑	+ OTHER DELIVERABLES AS DEFINED IN THE RFP.	
• Test structural design against other criteria; including impact on weathering systems, confirm/amend provisional structural system selection. ☑		
• Confirm lift shaft dimensions, overrun and pit requirements, plant room sizes, sheave beam requirements etc. ☑		
• Confirm acceptability of access to fireman's lift and fire control panel. ☑		
• Confirm final detail requirements for lifts and escalators. ☑		
• Confirm typical floor beam depths, maximum duct depth requirements, floor-to-floor heights. ☑		
• Prepare options complying with reflectance, heat gain/loss requirements, glass shading coefficients; ventilation, energy conservation systems, solar shading systems. Review with client and building services engineers. Select. ☑		

Design Documentation Guidelines Architecture

Developed Design Phase continued

Design Process	Deliverables	Commentary
• Test mechanical design against other criteria; confirm/amend provisional building services system selections. ☑	IN COLLABORATION WITH HVAC ENGINEER.	
• Confirm that sanitary fixture count meets statutory requirements. ☑		
• Establish location and provisional size of electrical sub-station, if required; consult power supply authority. ☑		
• Prepare/commission energy management study. ☒	BY OTHERS	
• Prepare computer floor options study. Review with client. ☑		
• Prepare options study for building maintenance unit; review with client. ☑		
• Verify exterior glazing design compatibility with structure and HVAC. ☑		
• Confirm ceiling module dimensions and advise. ☑		
• Confirm all service utility entry points, sizes, and requirements. ☑		
• Confirm fire rating requirements for all building elements. ☑		
• Confirm compliance with all development rules. ☑		
• Review all plans elevations and sections, prepare details of typical construction. ☑		
• Submit developed design to quantity surveyor for review of cost plan. ☑		
• Review and revise project programme. ☒	BY OTHERS.	
• Coordinate all design information between disciplines ☑		

Design Documentation Guidelines Architecture

Detailed Design Phase

Design Process

Inputs:

- Client approval of developed design. ☑
- Client approval of developed cost plan and feasibility analysis. ☑
- Reviewed district plan analysis. ☑
- Review and revise developed design. ☑
- Developed structural engineering. ☑
- Developed services engineering. ☑
- Developed fire engineering. ☑
- Developed environmental studies. ☑
- Developed acoustic advice. ☑
- Current project programme. ☑

Tasks:

- Attend regular design phase meetings with relevant parties. ☑
- Co-ordinate and check each sub-consultant and other consultants' design and drawings with the architectural drawings at regular intervals. ☑
- Update document register. ☑
- Confirm project drawing, CAD, website and communication standards. ☑
- Consider buildability constraints and implications. ☑
- Highlight significant or unusual health and safety risks that were identified in the design process. ☑

Deliverables

Drawings:

Full set of drawings as per drawing register including: ☑

- Site plan including datum, boundary definition and orientation, associated earthworks, landscaping and carparking, inground and overhead services, drainage and all statutory legal title information. ☑
- Key plans to building zoning ☑
- Floor plans at each level. ☑
- Reflected ceiling plans at each level including coordinated lighting and services fixtures. ☑
- External elevations. ☑
- Interior elevations. ☑
- Cross sections and longitudinal sections. ☑
- Roof plan with falls, gutters, rainwater heads and downpipes ☑
- Electrical/lighting outlet and switching plan ☑
- Plumbing layout and schematics. ☑
- Construction details at all typical and atypical locations cross referenced to plans and sections. ☑
- Weathertightness details. ☑
- Plans, sections of access stairs, ramps, balustrades, barriers and handrails, including plant access. ☑
- Interior fitout including wall elevations and joinery details ☑

Commentary

1. It is important to understand the means by which a construction contract is to be procured as this will inevitably impact on the format of the documentation produced and the design quality of the construction achieved. It may also be advantageous to the achieved design quality to have input into the prospective contractors/tender list. Consequently, in the detailed design phase, or any phase in which it is intended to procure a tender, the design consultants may need to:
   - Determine method of construction contract procurement.
   - Determine form of conditions of construction contract.
   - Prepare contract documents for client and contractor's signatures.
   - Review and prepare documentation for tender with client, including insurance details, method of tender, bond, liquidated damages and tender protocols (where required).
   - Review tenders for compliance with tender documents and respond to technical options offered.
2. Design of secondary architectural elements is sufficiently developed to consult the structural engineer on any specific design required.

Design Documentation Guidelines Architecture

Detailed Design Phase continued

Design Process

- Confirm and respond to revisions to cost plan. ☑
- Review all plans, elevations and sections, prepare details of typical and atypical construction. ☑
- Review tolerances established for all surfaces and materials, co-ordinate with specification. ☑
- Fully dimension all elements and datum. ☑
- Request list of 'builders work' items from other consultants, incorporate with architectural details. ☑
- Prepare architectural detailed design drawings. ☑
- Determine form of conditions of contract and incorporate into specification. ☑
- Prepare preliminaries and architecture trade sections to specification and co-ordinate trade sections with other sub consultants or consultants. ☑
- Confirm finishes schedule against specification and schedule of monetary provisions. ☑
- Obtain client agreement on contingency sum allowances. ☑
- Coordinate all design information between disciplines as per separate co-ordination checklist. ☑
- Finalise glazing selection in consultation with building services engineer; confirm against requirements of authorities. ☑
- Review provisions for PABX with Telecom and client's real estate advisers. ☑
- Review and confirm security system provisions with client and building services engineer. ☒

Deliverables

Schedules:

- Schedule of internal and exterior finishes. ☑
- Schedule of internal and external opening joinery. ☑
- Schedule of hardware. ☑
- Schedule of sanitary fittings and tapware. ☑
- Schedule of joinery fittings. ☑
- Schedule of net sums. ☑

Specifications:

- Building specification including preliminaries and all trade sections. ☑
- Performance specifications for any works involving constructor design. ☑

Contractor Procurement:

- Registration and short listing of contractors. ☒ – BY OTHERS.
- Conditions of tender, notices to tenderers and general conditions of contract. ☒ – BY OTHERS
- Contract documents. ☑

Commentary

3. Where appropriate carry out discussion with a 'preferred' contractor on construction methodology.
4. Design may be sufficient to lodge for building consent part way through this process.
5. Detailed design generally provides a level of documentation that clearly defines all architectural elements. Design details should be coordinated with other disciplines. However, the documents produced in this phase may not be able to be directly built from.
6. Identify in the specification the significant or unusual health and safety risks that were identified in the design.
7. Refer to separate co-ordination checklist documents.

Design Documentation Guidelines Architecture

Detailed Design Phase continued

Design Process	Deliverables	Commentary
• Review and confirm communications and PA system provisions with client and building services engineer. ☒		
• Review and confirm cleaning, refuse and waste paper removal system provisions with client and building services engineer. ☑		
• Confirm if energy management system is to be employed; establish brief. ☑		
• Confirm details and compliance of thermal envelope including glazing with code requirements and/or mechanical design with relevant consultants. ☑		
• Confirm expansion and control joint details with structural engineer; verify that precast panel design and jointing conforms to thermal and other movement criteria, review impact on weathering. ☑		
• Confirm requirements with structural engineer for attaching of cladding systems to edge beams; check details, including fire rating and acoustic requirements. ☑		
• Carry out architectural check on architectural drawings as per checklist. ☑		
• Submit drawings to quantity surveyor for final adjustment of cost plan. ☑		
• Analyse tenders and report recommendations to client. ☑	- IN COLLABORATION WITH PM + Q.S.	
• Advise client of maintenance and durability responsibilities. ☑		
• Obtain client approval and sign off for completed drawings and specification. ☑		

Design Documentation Guidelines Architecture

Construction Design Phase

Design Process

Inputs:

- Client approval of detailed design incorporating changes resulting from contract agreement process. ☑
- Building consent issues register. ☑
- Construction programme and sequencing. ☑
- Contract documents defined in sufficient detail for sub-trades to produce fabrication documents. ☑
- Craneage or access restrictions defined. ☑

Tasks:

- Attend regular design phase meetings with relevant parties. ☑
- Update document register. ☑
- Prepare architectural construction design drawings incorporating changes agreed as a result of tender process and negotiations. ☑
- Site safety programme issued to all parties. ☑
- Issue shop drawings to consultants for review. ☒
- Coordinate interface between trades and receive, review and coordinate detailed 'shop drawings' for: ☒
  - windows/façade systems. ☒
  - pre-cast elements - wall and flow systems. ☒
  - pre-cut timber framing. ☒
  - steel shop drawings. ☒
  - proprietary items. ☒
  - other fabricated items. ☒

Deliverables

General:

- Review or supply of technical specifications for contractor designed items or alternative designs. ☑
- Revisions of drawings, details and specifications as required by contract agreement process. ☑
- Revisions of drawings, details and specifications as required by building consent process. ☑
- Revisions of drawings, details and specifications as required by construction process. ☑

Shop Drawings:

- Production of construction/fabrication/shop drawings for selected items. ☒
- Review of construction/fabrication/shop drawings for selected items. ☑

+ OTHER DELIVERABLES AS DEFINED IN THE RFP.

ARCHITECT RESPONSIBLE FOR REVIEW OF SHOP DRAWINGS RELATING TO ARCHITECTURAL ELEMENTS ONLY

Commentary

1. Construction design is perceived as separate from construction phase observation/monitoring or contract administration services.
2. At conclusion of construction design, it should be possible to construct the works without further recourse to the design consultant for design information.
3. Construction phase services need to be defined in the engagement agreement.
4. Refer to separate co-ordination checklist documents.
5. The site safety management plan prepared by contractor should be circulated to all parties.
6. The supply of supplementary information as required during the construction process occurs in the construction phase.
7. Refer to the relevant discipline guidelines for engineering shop drawing requirements.

Design Documentation Guidelines Architecture

Construction Design Phase continued

Design Process	Deliverables	Commentary
• Prepare shop drawings for: - windows / façade systems. ☒ - pre-cast elements - wall and floor systems. ☒ - pre-cut timber framing. ☒ - as built drainage drawings. ☒ - steel shop drawings. ☒ - proprietary items. ☒ • Other fabricated items. ☒	ARCHITECT RESPONSIBLE FOR REVIEW ONLY.	
• Co-ordinate the design with detailed shop drawings required by other disciplines: ☑ - HVAC - duct layout, plant selection and technical data. ☑ - hydraulics - schematics, duct layout, plant selection and technical data. ☑ - fire protection. ☑ - electrical services including layouts and elevations of MSSB. ☑ - lift and escalators - confirmed shaft sizes, car platform sizes, car interiors, setout. ☑ - security systems. ☑ - schedules for sanitary fittings, hardware. ☑ • Review performance specifications. ☑		

Appendix D – Otago Polytechnic Sustainability Protocol

TRICIA LOVE CONSULTANTS LTD

27th January 2016
Rev. 0.2

Sustainability Design Brief – Otago Polytechnic Campus Development

Purpose & Vision for Sustainability Goals within Otago Polytechnic Campus Development

To create a Living Learning laboratory which will support, inspire and engage the spirit of the students and staff within the Polytechnic and inspire the wider community through beauty, innovation and engagement, consistent with the values of Otago Polytechnic using the Living Building Challenge and the Living Community Challenge as a design framework.

The Otago Polytechnic Campus Development Plan (OPCDP) will be sustainably designed, constructed and operated to create resource efficient sites at Forth St and Albany St, Dunedin, that inspire healthy living, teach resource efficiency, reduces our overall footprint on the environment and contributes positively to our environmental handprint.

One of our goals is to provide a world-class demonstration of sustainability within tertiary student education facilities, explain why various design elements are important, and inspire students and visitors to implement solutions in their own future homes and communities.

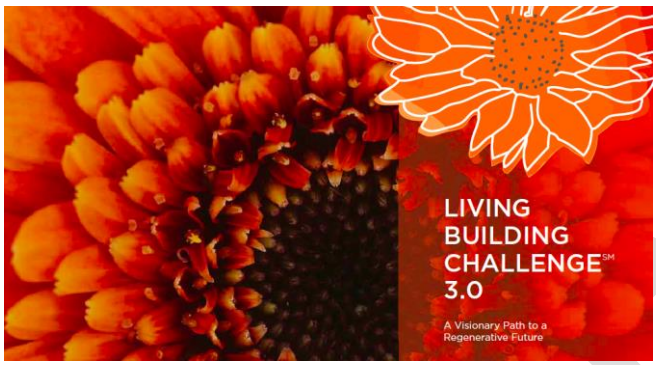
Education for Sustainability (EfS) will be one of our core missions to integrate into the final design and operation of the buildings and Campus sites as a whole. Fun and engaging educational opportunities will be incorporated throughout the buildings and landscape both as a means to engage discussion and promote behavior change on a daily basis.

The project team will be encouraged to ask the question "is this design, material selection or construction method in the best interest of our larger world, the Polytechnic community and the students who will use the facility?"

The goal is to integrate resource efficient technology into the buildings and landscape design in such a way that it contributes to the beauty of the project

and doesn't necessarily draw attention to itself. It is intended that all buildings support and contribute cohesively with other buildings within the Campus site.

The project will aspire to the philosophies; advocacy and public education goals outlined in the Living Building Challenge 3.0 (LBC) and the Living Community Challenge 1.0 (LCC). The LBC and LCC provides a framework of 20 imperatives that define sustainability in a broad community context.



Living Building Challenge 3.0 handbook

The hallmark goal of the project will be to design, build and operate both Campuses using the Living Building Challenge and the Living Community Challenge as a design framework.

Though the Campus Development will aspire to all 20 imperatives, we will not necessarily seek full Living Building Challenge or Living Community Challenge certification or compliance although the projects will be registered with the International Living Future Institute (ILFI) to enable access to project team resources.

Forth St Site : We envisage this site contains opportunities for redevelopment following the principles of the Living Community Challenge with potential opportunity for new or refurbished buildings to be designed to Living Building Challenge Petal Certification standards with a focus on Materials and/or Energy Petal compliance.

Albany St Site : We envisage this site contains opportunities for redevelopment following the principles of the Living Community Challenge with potential opportunity for any new building work to be designed to full Living Building Challenge or Petal Certification standards with a focus on either Energy and/or Materials Petal compliance.

Further investigation work will be required as part of the concept and re-validation process of the Campus Development Plan to further refine the LBC goals and objectives into specific measurable targets.

It is envisaged student resources will be utilized to undertake some research associated with the LBC imperatives such as sourcing Red List compliant materials and input into the beauty and biophilia imperatives to both support the design team and the student learning experience.

It is intended that all materials used in the project will be researched and tracked under the LBC requirements. All teams should make due allowance for a FTE materials researcher.

A summary matrix is provided in the Appendix which evaluates the current masterplan design against the requirements of all LBC and LCC imperatives for both Campus sites.

Apart from the LBC 3.0 challenge requirements, top-level sustainability goals are identified in the Otago Polytechnic Purpose and Vision document located in the Appendix. In addition, benchmark energy and water consumption targets will be set in due course for the project as a whole.

Project goals:

1. **Energy efficiency & greenhouse gases.** Minimize energy usage and maximize the use of renewable energy therefore reducing carbon dioxide and other greenhouse gas emissions from energy generation. These initiatives also provide a hedge against increasing energy costs.
2. **Low embodied energy.** Minimize the embodied energy of the structures by using products and materials, which require minimal energy during processing, manufacture and transportation.
3. **Water conservation.** Reduce water use through low flow fittings and water efficient appliances in conjunction with behavior change management. This results in energy and resource efficiency by minimizing supply and waste water infrastructure requirements and reduced water storage needs. Water efficiency results in a project with a greater ability to provide for its own water needs and reduces the cost of water supply and wastewater disposal.
4. **Health & comfort.** Ensure warm and dry buildings with good daylight and fresh air supply increasing the comfort, happiness and health of occupants. Selection of materials, which support occupant and community health through the elimination of 'worst in class' toxic chemicals and manufacturing processes wherever possible.
5. **Waste minimization.** Landfill waste can be reduced by using materials efficiently through the design and construction process, during operation, adopting recycling and reuse practice onsite and designing for disassembly and recycling at the end of a building's life cycles.
6. **Low pollutant emissions.** Pollutant emissions can be reduced through the use of low emission products and materials, stormwater management and environmental management during construction and operation. These initiatives reduce the impact on Dunedin's local environment (air, waterways and soil) and will help to improve the internal air quality of the building.
7. **Durability and Resiliency.** Durable materials and products can help to reduce maintenance and resource costs. It is important to assess

durability based on life cycle analysis. Resiliency considers the ability for the buildings, services and site to operate autonomously in the event of a natural disaster and enable the project to act as a centre for civil defense.

8. **Education for Sustainability.** Identify opportunities for student/staff engagement and involvement through involvement in specific design elements and/or observation opportunities. Participation of the design/construction team and Polytechnic community in LBC educational workshops and open days. Provide opportunities for monitoring, recording and reporting of environmental data through Polytechnic communication channels.
9. **Community/Campus as a Living Learning Environment.** Each site to incorporate elements to enable the campus to operate as a living/learning laboratory integrating engaging opportunities to interact and become an integral part of the buildings and external environment. Incorporate elements that stimulate left and right brain thinking and the ability for fun and recreation to contribute to the wellness of the whole body and mind.

Note: The Appendix contains a matrix of the above project design goals overlaid on the LBC and LCC imperatives prepared by Trish Love.

Design opportunities for the Otago Polytechnic Campus Redevelopment

1. Site
    a. Design of external spaces utilising Child Centered Pattern framework ideologies (refer to the Living Community Challenge website)
    b. Design of masterplan and external landscape to facilitate physical and social connectedness and shelter from the weather.
    c. Solar access:
        i. Good solar access all year round to maximize passive solar heating benefits whilst optimizing views and daylight.
        ii. North facing space to be optimized to benefit from the warmer temperatures and more daylight
        iii. Minimize South facing windows to size required for optimum daylight and visual connection.
    d. Walking and cycling:
        i. Provide secure connection paths around and between campuses.
        ii. Provide for weathertight secure bike storage and bike racks
    e. Topsoil retained onsite

i. Topsoil kept on site during construction and used for planting
ii. Avoid unnecessary transportation of soil to or from site
iii. Minimizing topsoil movement to help minimize disturbance of organisms in soil.
iv. Retain responsibility for soil regeneration

f. Onsite produce
   i. Provide for on-site organic and herb gardens in conjunction with wider campus urban agriculture plan,
g. Biodiversity
   i. Assessment and documentation of the existing site and design for improvement of the final ecology to include for native species and ecosystems indigenous to the area.

2. Design
   a. Solar access: Mitigate hard to control solar gains through NE and NW façade via external shading and façade reticulation.
   b. Opening windows throughout to allow for optimizing natural ventilation whilst ensuring safety from falling
   c. Add shading features to reduce solar gain on warm summer days
   d. Use of vegetation to allow for seasonal shading where appropriate.
   e. Optimally sized high performance glazed windows
   f. Size and location of windows in frequently used spaces optimized for good daylighting and solar gain, but minimal heat loss.
   g. Use of daylighting to minimize use of artificial lighting
   h. Design for access for people with disabilities to the NZBC and ADA standard as applicable.

3. Structure
   a. Air tightness and thermally broken construction to reduce heat loss and moisture transfer through the building envelope during the winter.
   b. Preferential selection of products and materials that are compliant with the LBC materials Petal.
   c. Preferential use of DECLARE certified products where appropriate.
   d. Ensuring walls, roof, floor and windows are thermally high performing.
   e. Implement passive heating and cooling strategies as available
      i. Thermal mass to reduce internal diurnal temperature fluctuations
      ii. Ability for secure summer night time ventilation

f. Heating and hot water provision from the Campus wood chip boiler reticulated LPHW heating system or from renewable energy as appropriate.

4. Solar
    a. Grid connected photovoltaic system
    b. Photovoltaic system to allow net zero energy use over a year for all electrical power consuming systems.
    c. Investigation into cost benefit of a D.C microgrid.
    d. Optimize use of on-site power generation within the wider campus development before exporting to the grid. Reduces and offsets use of grid electricity and associated emissions from wider Campus network
    e. Reduce exposure to rising electricity costs
    f. Preference to small car parking stations and electric car charging stations and use of electrical utility vehicles on-site

5. Water
    a. Water Metering
        i. Metering for hot and cold water uses to assist in water monitoring and leaks
        ii. Can assist in energy conservation by allowing users to monitor their high hot water usage
    b. Centralised rainwater harvesting and storage: rainwater harvesting, storage and treatment for potable and non-potable use with mains water top up within the campus and to serve adjacent existing Otago Polytechnic facilities such as the new Student Learning Village. Reduces use of municipal potable use and its associated cost.
    c. Investigation into cost benefit of grey water collection, treatment and reuse for toilet flushing and irrigation. Reduces flow of wastewater to the sewer and consumption of potable water.
    d. Low flow sanitary fittings: reduce water use. Use WELS rated fittings.
    e. On site stormwater treatment and discharge either on site or to adjacent Otago Polytechnic properties.

6. Energy metering: supply at building and sub circuit level to assist in energy monitoring and detection of unusually high energy loads

7. Integration of Room Management/Room utilization Systems with the Polytechnic Energy management system to reduce energy consumption during unoccupied times.

8. Lighting: use of 100% LED bulbs in all fixtures and site lighting.

9. Plug and standby loads: monitor, reduce and eliminate.

To meet our energy targets as described above it will be necessary to have an energy and water budget for each building and each member of the design team will need to account for every power load within the budget. At this stage it is anticipated the sustainability Consultant will maintain the energy budget for the buildings.

Sustainability engineer

The project has hired Tricia Love to provide LBC training to the project team, Polytechnic, and builders. She will also provide knowledge and connections to sustainable resources and products. She will work alongside design team members to provide them with the support they need to evaluate options and achieve the LBC/LCC objectives and goals identified in this document.

Appendix

- Purpose & Vision for Sustainability Goals within Otago Polytechnic Campus Development
- Matrix of project design goals overlaid onto the LBC 3.0 and LCC 1.0 framework.

Purpose & Vision for Sustainability Goals within Otago Polytechnic Campus Development

To create a Living Learning laboratory which will support, inspire and engage the spirit of the students and staff within the Polytechnic and inspire the wider community through beauty, innovation and engagement, consistent with the values of Otago Polytechnic using the Living Building Challenge and the Living Community Challenge as a design framework.

Any sustainability goals adopted should take into consideration the Otago Polytechnic Sustainable Practice Strategic Framework 2013-2015.

In accordance with the Sustainable Practice Strategic Framework 2013-2015, solutions are to be values led and aspirational;

- High performing (Goals)
- Integrate opportunities for Otago Polytechnic Learning Life Cycle

The following key elements of the Strategic framework shall underlie the design of the Campus redevelopment in conjunction with the Living Building Challenge/Living Community Challenge;

VALUES – transforming lives and communities.

EDUCATION & RESEARCH – the "Living Campus" – Learning from seeing and doing, a Living Laboratory. Capture and tell the story and the learnings of the story.

COMMUNITY and BUSINESS – Ecological Handprint.

OPERATIONS – Ecological Footprint.

WELLNESS – Social and cultural wellbeing and cohesiveness.

https://www.op.ac.nz/assets/PDFs/2013-Strategic-Goals/2013-OP-Learning-Teaching-Strategic-Framework-FINAL.pdf

OTAGO POLYTECHNIC SPECIFIC TARGETS:

1. Otago Polytechnic have a long term commitment to reduce the overall Gross Floor Area (GFA) of the buildings on each site within the Campus from the current GFA.
2. Building spatial planning is to be undertaken with learning environments of the future in mind. Spaces are to be VERY flexible and will have the ability to be repurposed several times over the course of the building life (100 years design life).
3. The Campus masterplan and building design will facilitate social and educational cohesion providing opportunities for cross disciplinary projects run in parallel with the campus development design and construction.

4. The Campus masterplan and building design will enable sustainable operations. New and/refurbished buildings shall support and sit in harmony with other existing buildings within the campus site.
5. The campus and all buildings therein shall be designed as a 'Living Campus'. The campus and buildings therein shall be a demonstration of a learning laboratory enabling "learning from seeing and doing" and shall also enable the ability to capture and tell the story and the learnings of the story.

THE PROCESS TO ACHIEVE THE ABOVE TARGETS

DESIGN AND CONSTRUCTION METHODOLOGY

An integrated design approach is required to facilitate a regenerative design solution.

"Get the foundations right and the right solution will follow"

The success of an integrated design approach depends on the following factors;

- Tailoring the programme towards an integrated design approach rather than a traditional design procurement process.
- Selection and creation of individual/team culture to promote integrated, open and respected discussion.
- Facilitation of channels to enable design/construction team communication with Polytechnic community (students and staff) to enable co-creation opportunities.
- Sustainability Charter – to establish expectations of protocol and organisational behaviours.

COMMITTED OPEN BOOK LEARNING POLICY

Otago Polytechnic are committing to an open book/committed learning policy to enable the design team, construction team and Otago Polytechnic community to learn, be engaged and be inspired by involvement in the project. A sustainable communications strategy will;

- Nurture and inspire team members
- Nurture and inspire student and staff of the Polytechnic
- Inspire and provide learnings for the Polytechnic and wider National/International community to use in future projects through sharing of design/construction knowledge and operational data monitoring and reporting.

COST ANALYSIS

Cost analysis/ROI analysis of specific sustainability design solutions are to be undertaken and assessed on a case by case basis.

Goals for Otago Polytechnic Campus Development Plan

Albany St Campus

Living Community Challenge Version 1.0

TRICIA LOVE CONSULTANTS LTD

Transect Estimate L4 - General Urban Zone
FAR (Floor Area Ratio) : TBC

PLACE	Energy Efficiency	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Limits to Growth										possible with exception about predeveloped flood plain sites	Site is in CBD reach floodplain area
Urban Agriculture										t.b.c	scale jumping to be considered.
Habitat Exchange										possibly yes	OP/DCC arrangement
Human Powered Living										yes,	

WATER	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
creating water independant sites, buildings and communities										No	campus is near terminus of DCC stormwater infrastructure. Campus SW basically runs directly into harbour. A lot of opportunities here for on site stormwater management and connection to place. On-site blacwater treatment not currently being considered.

ENERGY	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Net Positive Energy relying only on current solar income										Yes	Energy budget through available on site power generation to be reviewed against benchmark building EUI's. All buildings have good solar orientation. Usage of buildings may dictate ability to meet this imperative eg automotive workshops.

HEALTH & HAPPINESS	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Civilized Environment										yes	
HealthyNeighbourhood design										yes	
Biophillic Environment										yes	research opportunity for students
Resilient Community Connections										tbc	

MATERIALS	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Living Materials Plan										yes but requires in depth research of each product used.	potential to use OP students for research
Embodied Carbon Footprint										yes	financial contribution
Net Positive Waste										yes	

EQUITY	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Human scale & Humane Places										Surface cover tbc	15% surface cover permitted for L4 transect
Universal Access to Nature & Place										yes	possible with design to NZBC and ADA for accessibility
Universal Access to Community Services										yes	
Equitable Investment										yes	possible - monetary contribution
JUST organisations										would require one team member to undertake JUST certification	

BEAUTY	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Beauty & Spirit										yes	opportunity for student involvement
Inspiration & Education										yes	opportunity for student involvement

indicates the imperative is achievable for the student village project

indicates the imperative may be achievable but requires further work or investigation

Goals for Otago Polytechnic Campus Development Plan

Albany St Campus - Stage 1, 2b,4a, 4b, & 5 - ABE and A&E building

Living Building Challenge Version 3.0

TRICIA LOVE CONSULTANTS LTD

Transect Estimate L4 - General Urban Zone

FAR (Floor Area Ratio) : N/A

PLACE	Energy Efficiency	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Limits to Growth										Only possible if bldg is in Transect L5	Site is in CBD reach floodplain area
Urban Agriculture										only if scale jumping utilised	work with wider Campus plan
Habitat Exchange										possibly yes	OP/DCC arrangement
Human Powered Living										yes,	bike store within building or part of car park with covered link?

WATER	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
creating water independant sites										Dependant on scale jumping options.	Stormwater and greywater treatment within wider campus stormwater design possible dependant on water consumption. Options for feeding into central campus rainwater storage system for potable/greywater use within buildings. On site blackwater treatment may be impractical/not permitted by council.

ENERGY	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Net Positive Energy										Yes	Energy budget through available on site power generation to be reviewed against benchmark building EUI's. All buildings have good solar orientation

HEALTH & HAPPINESS	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Civilized Environment										yes	openable windows required and min 10% glazing. Trickle vents not acceptable under LBC
Healthy Interior Environment										yes	
Biophillic Environment										yes	research opportunity for students

MATERIALS	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Red List										yes but requires in depth research of each product used.	potential to use OP students for research
Embodied Carbon Footprint										yes	financial contribution
Responsible Industry										yes	
Living Economy Sourcing										yes	requires in depth research of each product used. NZ sourced products tend to have significant cost premium over imported goods
Net Positive Waste										yes	

EQUITY	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Human scale & Humane Places										Surface cover	15% surface cover permitted for L4 transect (approx 924m2) possible exclusions for existing car parking and campus settings
Universal Access to Nature & Place										yes	possible with design to NZBC and ADA for accessibility
Equitable Investment										yes	possible - monetary contribution
JUST organisations										would require one team member to undertake JUST certification	

BEAUTY	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Beauty & Spirit										yes	opportunity for student involvement
Inspiration & Education										yes	opportunity for student involvement

indicates the imperative is achievable for the student village project

indicates the imperative may be achievable but requires further work or investigation

Goals for Otago Polytechnic Campus Development Plan

Forth St Campus

Living Community Challenge Version 1.0

TRICIA LOVE CONSULTANTS LTD

Transect Estimate L4 - General Urban Zone
FAR (Floor Area Ratio) : TBC

PLACE	Energy Efficiency	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Limits to Growth										possible with exception about predeveloped flood plain sites	Site is in CBD reach floodplain area
Urban Agriculture										t.b.c	
Habitat Exchange										possibly yes	OP/DCC arrangement
Human Powered Living										yes,	

WATER	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
creating water independant sites, buildings and communities										No	campus is near terminus of DCC stormwater infrastructure. Campus SW basically runs directly into harbour. A lot of opportunities here for on site stormwater management and connection to place. No on-site blackwater treatment anticipated.

ENERGY	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Net Positive Energy relying only on current solar income										No	use of wood chip boiler precludes this at a campus level.

HEALTH & HAPPINESS	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Civilized Environment										yes	
HealthyNeighbourhood design										yes	
Biophillic Environment										yes	research opportunity for students
Resilient Community Connections										tbc	

MATERIALS	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Living Materials Plan										yes but requires in depth research of each product used.	potential to use OP students for research
Embodied Carbon Footprint										yes	financial contribution
Net Positive Waste										yes	

EQUITY	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Human scale & Humane Places										Surface cover tbc	15% surface cover permitted for L4 transect
Universal Access to Nature & Place										yes	possible with design to NZBC and ADA for accessibility
Universal Access to Community Services										yes	
Equitable Investment										yes	possible - monetary contribution
JUST organisations										would require one team member to undertake JUST certification	

BEAUTY	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Beauty & Spirit										yes	opportunity for student involvement
Inspiration & Education										yes	opportunity for student involvement

indicates the imperative is achievable for the student village project

indicates the imperative may be achievable but requires further work or investigation

Goals for Otago Polytechnic Campus Development Plan

Forth St Campus - Stage 2a & 3 - Art & Design Building

Living Building Challenge Version 3.0

TRICIA LOVE CONSULTANTS LTD

Transect Estimate L4 - General Urban Zone
FAR (Floor Area Ratio) : N/A

PLACE	Energy Efficiency	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Limits to Growth										Only possible if bldg is in Transect L5	Site is in CBD reach floodplain area
Urban Agriculture										only if scale jumping utilised	work with wider Campus plan
Habitat Exchange										possibly yes	OP/DCC arrangement
Human Powered Living										yes,	bike store within building or part of car park with covered link?

WATER	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
creating water independant sites										Dependant on scale jumping options.	Stormwater and greywater treatment within wider campus stormwater design possible dependant on water consumption. Options for feeding into central campus rainwater storage system for potable/greywater use within buildings. On site blackwater treatment may be impractical/not permitted by council.

ENERGY	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Net Positive Energy										Not if heating is retained as served from wood chip boiler.	dependant on heating energy source. Option to consider identifying any extension to existing A block as a stand alone LBC building. Existing A block to retain heating from wood chip boiler. Proposed solar orientation is good for PV.

HEALTH & HAPPINESS	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Civilized Environment										yes	openable windows required and min 10% glazing. Trickle vents not acceptable under LBC
Healthy Interior Environment										yes	
Biophillic Environment										yes	research opportunity for students

MATERIALS	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Red List										yes but requires in depth research of each product used.	potential to use OP students for research
Embodied Carbon Footprint										yes	financial contribution
Responsible Industry										yes	
Living Economy Sourcing										yes	requires in depth research of each product used. NZ sourced products tend to have significant cost premium over imported goods
Net Positive Waste										yes	

EQUITY	Energy Efficiency & Greenhouse Gases	Low Embodied Energy	Water Conservation	Health and Comfort	Waste minimisation	Low Pollutant Emissions	Durability & Resilience	Education for Sustainability	Community/ campus as a learning environment	is the Imperative achievable?	Comments
Human scale & Humane Places										Surface cover	15% surface cover permitted for L4 transect (approx 924m2) possible exclusions for existing car parking and campus settings
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Equitable Investment										yes	possible - monetary contribution
JUST organisations										would require one team member to undertake JUST certification	

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Beauty & Spirit										yes	opportunity for student involvement
Inspiration & Education										yes	opportunity for student involvement

indicates the imperative is achievable for the student village project

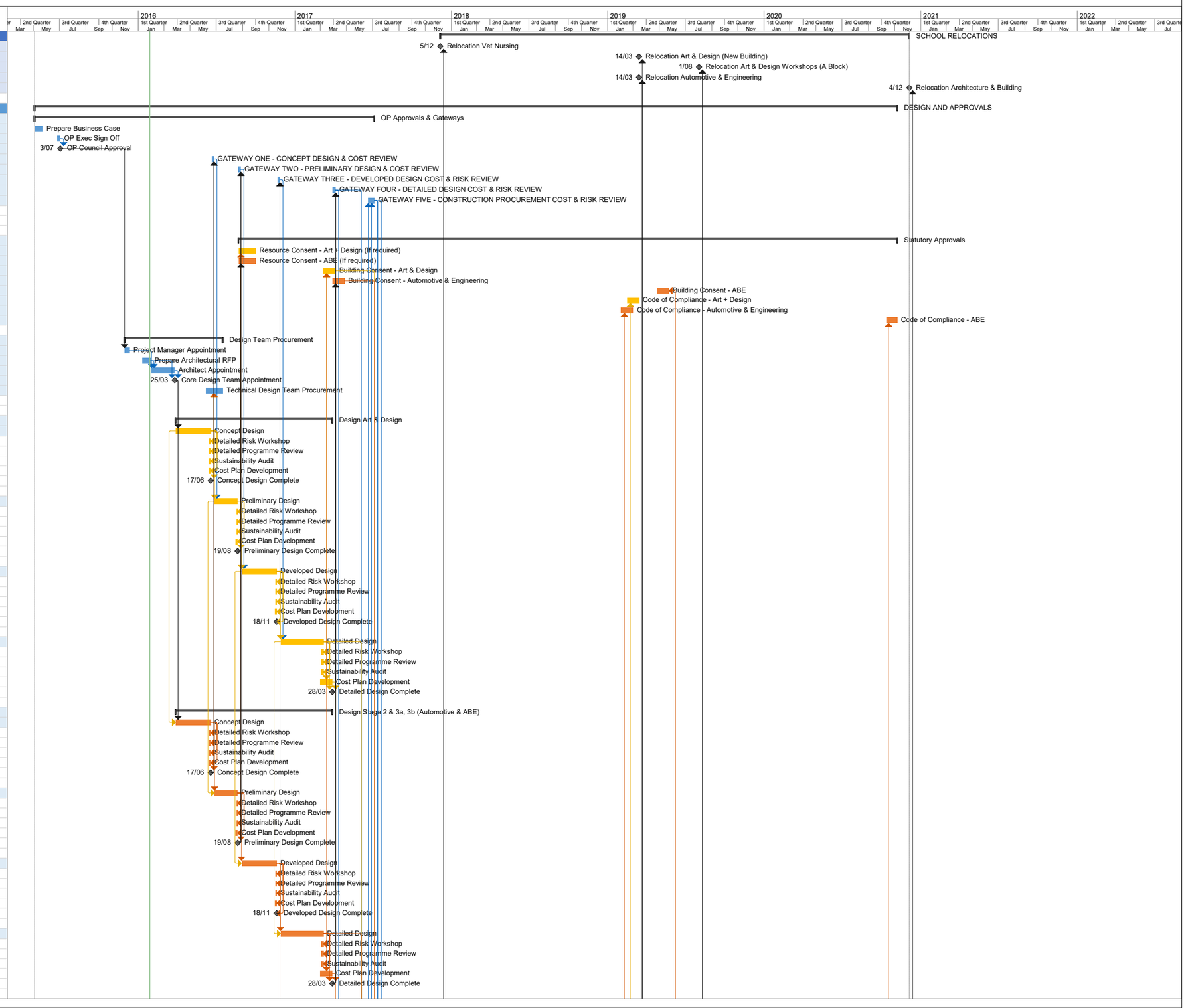
indicates the imperative may be achievable but requires further work or investigation

Appendix E – Preliminary Development Programme

OTAGO POLYTECHNIC
CAMPUS REDEVELOPMENT
STRATEGIC DEVELOPMENT PROGRAMME

LOGIC GROUP

ID	Task Name	Duration	Start	Finish
1	**SCHOOL RELOCATIONS**	**750 days**	**Tue 5/12/17**	**Fri 4/12/20**
2	**Relocation Vet Nursing**	**0 days**	**Tue 5/12/17**	**Tue 5/12/17**
3	**Relocation Art & Design (New Building)**	**0 days**	**Thu 14/03/19**	**Thu 14/03/19**
4	**Relocation Art & Design Workshops (A Block)**	**0 days**	**Thu 1/08/19**	**Thu 1/08/19**
5	**Relocation Automotive & Engineering**	**0 days**	**Thu 14/03/19**	**Thu 14/03/19**
6	**Relocation Architecture & Building**	**0 days**	**Fri 4/12/20**	**Fri 4/12/20**
7				
8	**DESIGN AND APPROVALS**	**1381 days**	**Mon 4/05/15**	**Fri 6/11/20**
9	**OP Approvals & Gateways**	**541 days**	**Mon 4/05/15**	**Tue 4/07/17**
10	Prepare Business Case	3 wks	Mon 4/05/15	Fri 22/05/15
11	OP Exec Sign Off	1 wk	Fri 26/06/15	Thu 2/07/15
12	**OP Council Approval**	**0 days**	**Fri 3/07/15**	**Fri 3/07/15**
13	**GATEWAY ONE - CONCEPT DESIGN & COST REVIEW**	**1 wk**	**Mon 20/06/16**	**Fri 24/06/16**
14	**GATEWAY TWO - PRELIMINARY DESIGN & COST REVIEW**	1 wk	Mon 22/08/16	Fri 26/08/16
15	**GATEWAY THREE - DEVELOPED DESIGN COST & RISK REVIEW**	1 wk	Mon 21/11/16	Fri 25/11/16
16	**GATEWAY FOUR - DETAILED DESIGN COST & RISK REVIEW**	1 wk	Wed 29/03/17	Tue 4/04/17
17	**GATEWAY FIVE - CONSTRUCTION PROCUREMENT COST & RISK**	2 wks	Wed 21/06/17	Tue 4/07/17
18				
19				
20				
21	**Statutory Approvals**	**1055 days**	**Mon 22/08/16**	**Fri 6/11/20**
22	Resource Consent - Art + Design (If required)	6 wks	Mon 22/08/16	Fri 30/09/16
23	Resource Consent - ABE (If required)	6 wks	Mon 22/08/16	Fri 30/09/16
24	Building Consent - Art & Design	1 mon	Wed 8/03/17	Tue 4/04/17
25	Building Consent - Automotive & Engineering	1 mon	Wed 29/03/17	Tue 25/04/17
26	Building Consent - ABE	1 mon	Fri 26/04/19	Fri 24/05/19
27	Code of Compliance - Art + Design	1 mon	Fri 15/02/19	Thu 14/03/19
28	Code of Compliance - Automotive & Engineering	1 mon	Fri 1/02/19	Thu 28/02/19
29	Code of Compliance - ABE	1 mon	Mon 12/10/20	Fri 6/11/20
30				
31	**Design Team Procurement**	**151 days**	**Mon 30/11/15**	**Fri 15/07/16**
32	Project Manager Appointment	2 wks	Mon 30/11/15	Fri 11/12/15
33	Prepare Architectural RFP	3 wks	Mon 11/01/16	Fri 29/01/16
34	Architect Appointment	8 wks	Mon 1/02/16	Fri 25/03/16
35	Core Design Team Appointment	0 days	Fri 25/03/16	Fri 25/03/16
36	Technical Design Team Procurement	6 wks	Mon 6/06/16	Fri 15/07/16
37				
38				
39	**Design Art & Design**	**250 days**	**Mon 28/03/16**	**Tue 28/03/17**
40	**Concept Design**	**3 mons**	**Mon 28/03/16**	**Fri 17/06/16**
41	Detailed Risk Workshop	3 days	Wed 15/06/16	Fri 17/06/16
42	Detailed Programme Review	1 wk	Mon 13/06/16	Fri 17/06/16
43	Sustainability Audit	1 wk	Mon 13/06/16	Fri 17/06/16
44	Cost Plan Development	1 wk	Mon 13/06/16	Fri 17/06/16
45	**Concept Design Complete**	**0 days**	**Fri 17/06/16**	**Fri 17/06/16**
46				
47	**Preliminary Design**	**2 mons**	**Mon 27/06/16**	**Fri 19/08/16**
48	Detailed Risk Workshop	3 days	Wed 17/08/16	Fri 19/08/16
49	Detailed Programme Review	3 days	Wed 17/08/16	Fri 19/08/16
50	Sustainability Audit	3 days	Wed 17/08/16	Fri 19/08/16
51	Cost Plan Development	1 wk	Mon 15/08/16	Fri 19/08/16
52	**Preliminary Design Complete**	**0 days**	**Fri 19/08/16**	**Fri 19/08/16**
53				
54	**Developed Design**	**3 mons**	**Mon 29/08/16**	**Fri 18/11/16**
55	Detailed Risk Workshop	3 days	Wed 16/11/16	Fri 18/11/16
56	Detailed Programme Review	3 days	Wed 16/11/16	Fri 18/11/16
57	Sustainability Audit	3 days	Wed 16/11/16	Fri 18/11/16
58	Cost Plan Development	1 wk	Mon 14/11/16	Fri 18/11/16
59	**Developed Design Complete**	**0 days**	**Fri 18/11/16**	**Fri 18/11/16**
60				
61	**Detailed Design**	3 mons	Mon 28/11/16	Tue 7/03/17
62	Detailed Risk Workshop	3 days	Fri 3/03/17	Tue 7/03/17
63	Detailed Programme Review	3 days	Fri 3/03/17	Tue 7/03/17
64	Sustainability Audit	3 days	Fri 3/03/17	Tue 7/03/17
65	Cost Plan Development	4 wks	Wed 1/03/17	Tue 28/03/17
66	**Detailed Design Complete**	**0 days**	**Tue 28/03/17**	**Tue 28/03/17**
67				
68	**Design Stage 2 & 3a, 3b (Automotive & ABE)**	**250 days**	**Mon 28/03/16**	**Tue 28/03/17**
69	**Concept Design**	**3 mons**	**Mon 28/03/16**	**Fri 17/06/16**
70	Detailed Risk Workshop	3 days	Wed 15/06/16	Fri 17/06/16
71	Detailed Programme Review	1 wk	Mon 13/06/16	Fri 17/06/16
72	Sustainability Audit	1 wk	Mon 13/06/16	Fri 17/06/16
73	Cost Plan Development	1 wk	Mon 13/06/16	Fri 17/06/16
74	**Concept Design Complete**	**0 days**	**Fri 17/06/16**	**Fri 17/06/16**
75				
76	**Preliminary Design**	**2 mons**	**Mon 27/06/16**	**Fri 19/08/16**
77	Detailed Risk Workshop	3 days	Wed 17/08/16	Fri 19/08/16
78	Detailed Programme Review	3 days	Wed 17/08/16	Fri 19/08/16
79	Sustainability Audit	3 days	Wed 17/08/16	Fri 19/08/16
80	Cost Plan Development	1 wk	Mon 15/08/16	Fri 19/08/16
81	**Preliminary Design Complete**	**0 days**	**Fri 19/08/16**	**Fri 19/08/16**
82				
83	**Developed Design**	**3 mons**	**Mon 29/08/16**	**Fri 18/11/16**
84	Detailed Risk Workshop	3 days	Wed 16/11/16	Fri 18/11/16
85	Detailed Programme Review	3 days	Wed 16/11/16	Fri 18/11/16
86	Sustainability Audit	3 days	Wed 16/11/16	Fri 18/11/16
87	Cost Plan Development	1 wk	Mon 14/11/16	Fri 18/11/16
88	**Developed Design Complete**	**0 days**	**Fri 18/11/16**	**Fri 18/11/16**
89				
90	**Detailed Design**	3 mons	Mon 28/11/16	Tue 7/03/17
91	Detailed Risk Workshop	3 days	Fri 3/03/17	Tue 7/03/17
92	Detailed Programme Review	3 days	Fri 3/03/17	Tue 7/03/17
93	Sustainability Audit	3 days	Fri 3/03/17	Tue 7/03/17
94	Cost Plan Development	4 wks	Wed 1/03/17	Tue 28/03/17
95	**Detailed Design Complete**	**0 days**	**Tue 28/03/17**	**Tue 28/03/17**
96				



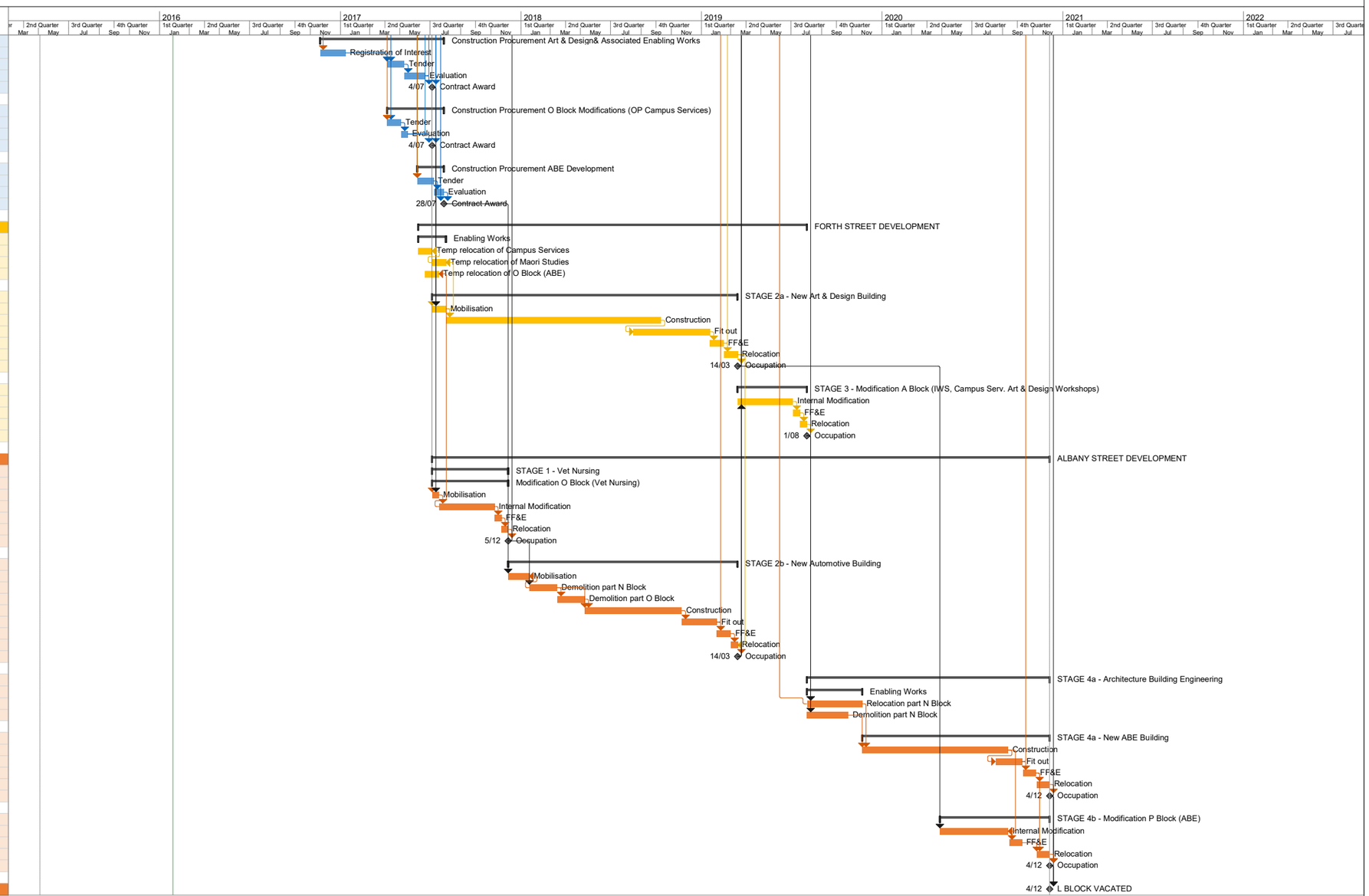
Project: OP Dev Plan Prog Rev 0

Task | Summary | Inactive Milestone | Duration-only | Start-only | External Milestone | Manual Progress
Split | Project Summary | Inactive Summary | Manual Summary Rollup | Finish-only | Deadline
Milestone | Inactive Task | Manual Task | Manual Summary | External Tasks | Progress

OTAGO POLYTECHNIC
CAMPUS REDEVELOPMENT
STRATEGIC DEVELOPMENT PROGRAMME

LOGIC GROUP

ID	Task Name	Duration	Start	Finish
97	**Construction Procurement Art & Design& Associated Enabling**	**168 days**	**Mon 21/11/16**	**Fri 28/07/17**
98	Registration of Interest	5 wks	Mon 21/11/16	Tue 10/01/17
99	Tender	5 wks	Wed 5/04/17	Tue 9/05/17
100	Evaluation	6 wks	Wed 10/05/17	Tue 20/06/17
101	**Contract Award**	**0 days**	**Tue 4/07/17**	**Tue 4/07/17**
102				
103	**Construction Procurement O Block Modifications (OP Campus**	**83 days**	**Wed 5/04/17**	**Fri 28/07/17**
104	Tender	4 wks	Wed 5/04/17	Tue 2/05/17
105	Evaluation	2 wks	Wed 3/05/17	Tue 16/05/17
106	**Contract Award**	**0 days**	**Tue 4/07/17**	**Tue 4/07/17**
107				
108	**Construction Procurement ABE Development**	**40 days**	**Mon 5/06/17**	**Fri 28/07/17**
109	Tender	5 wks	Mon 5/06/17	Fri 7/07/17
110	Evaluation	3 wks	Mon 10/07/17	Fri 28/07/17
111	**Contract Award**	**0 days**	**Fri 28/07/17**	**Fri 28/07/17**
112				
113	**FORTH STREET DEVELOPMENT**	**540 days**	**Wed 7/06/17**	**Thu 1/08/19**
114	**Enabling Works**	**40 days**	**Wed 7/06/17**	**Tue 1/08/17**
115	Temp relocation of Campus Services	1 mon	Wed 7/06/17	Wed 5/07/17
116	Temp relocation of Maori Studies	1 mon	Wed 5/07/17	Tue 1/08/17
117	Temp relocation of O Block (ABE)	1 mon	Wed 21/06/17	Wed 19/07/17
118				
119	**STAGE 2a - New Art & Design Building**	**420 days**	**Wed 5/07/17**	**Thu 14/03/19**
120	Mobilisation	1 mon	Wed 5/07/17	Tue 1/08/17
121	Construction	15 mons	Wed 2/08/17	Wed 10/10/18
122	Fit out	5 mons	Thu 16/08/18	Thu 17/01/19
123	FF&E	1 mon	Fri 18/01/19	Thu 14/02/19
124	Relocation	1 mon	Fri 15/02/19	Thu 14/03/19
125	**Occupation**	**0 days**	**Thu 14/03/19**	**Thu 14/03/19**
126				
127	**STAGE 3 - Modification A Block (IWS, Campus Serv. Art & Design**	**100 days**	**Fri 15/03/19**	**Thu 1/08/19**
128	Internal Modification	4 mons	Fri 15/03/19	Thu 4/07/19
129	FF&E	2 wks	Fri 5/07/19	Thu 18/07/19
130	Relocation	2 wks	Fri 19/07/19	Thu 1/08/19
131	**Occupation**	**0 days**	**Thu 1/08/19**	**Thu 1/08/19**
132				
133	**ALBANY STREET DEVELOPMENT**	**860 days**	**Wed 5/07/17**	**Fri 4/12/20**
134	**STAGE 1 - Vet Nursing**	**110 days**	**Wed 5/07/17**	**Tue 5/12/17**
135	**Modification O Block (Vet Nursing)**	**110 days**	**Wed 5/07/17**	**Tue 5/12/17**
136	Mobilisation	2 wks	Wed 5/07/17	Tue 18/07/17
137	Internal Modification	4 mons	Wed 19/07/17	Tue 7/11/17
138	FF&E	2 wks	Wed 8/11/17	Tue 21/11/17
139	Relocation	2 wks	Wed 22/11/17	Tue 5/12/17
140	**Occupation**	**0 days**	**Tue 5/12/17**	**Tue 5/12/17**
141				
142	**STAGE 2b - New Automotive Building**	**310 days**	**Wed 6/12/17**	**Thu 14/03/19**
143	Mobilisation	1 mon	Wed 6/12/17	Thu 18/01/18
144	Demolition part N Block	2 mons	Thu 18/01/18	Wed 14/03/18
145	Demolition part O Block	2 mons	Thu 15/03/18	Wed 9/05/18
146	Construction	7 mons	Thu 10/05/18	Wed 21/11/18
147	Fit out	2 mons	Thu 22/11/18	Thu 31/01/19
148	FF&E	1 mon	Fri 1/02/19	Thu 28/02/19
149	Relocation	2 wks	Fri 1/03/19	Thu 14/03/19
150	**Occupation**	**0 days**	**Thu 14/03/19**	**Thu 14/03/19**
151				
152	**STAGE 4a - Architecture Building Engineering**	**340 days**	**Fri 2/08/19**	**Fri 4/12/20**
153	**Enabling Works**	**80 days**	**Fri 2/08/19**	**Thu 21/11/19**
154	Relocation part N Block	4 mons	Fri 2/08/19	Thu 21/11/19
155	Demolition part N Block	3 mons	Fri 2/08/19	Thu 24/10/19
156				
157	**STAGE 4a - New ABE Building**	**260 days**	**Fri 22/11/19**	**Fri 4/12/20**
158	Construction	10 mons	Fri 22/11/19	Fri 11/09/20
159	Fit out	2 mons	Mon 17/08/20	Fri 9/10/20
160	FF&E	1 mon	Mon 12/10/20	Fri 6/11/20
161	Relocation	1 mon	Mon 9/11/20	Fri 4/12/20
162	**Occupation**	**0 days**	**Fri 4/12/20**	**Fri 4/12/20**
163				
164	**STAGE 4b - Modification P Block (ABE)**	**160 days**	**Mon 27/04/20**	**Fri 4/12/20**
165	Internal Modification	5 mons	Mon 27/04/20	Fri 11/09/20
166	FF&E	1 mon	Mon 14/09/20	Fri 9/10/20
167	Relocation	1 mon	Mon 9/11/20	Fri 4/12/20
168	**Occupation**	**0 days**	**Fri 4/12/20**	**Fri 4/12/20**
169				
170	**L BLOCK VACATED**	**0 days**	**Fri 4/12/20**	**Fri 4/12/20**



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Task	Summary	Inactive Milestone	Duration-only	Start-only	External Milestone	Manual Progress
Split	Project Summary	Inactive Summary	Manual Summary Rollup	Finish-only	Deadline
Milestone	Inactive Task	Manual Task	Manual Summary	External Tasks	Progress

Appendix F – Tender Declaration Form

Proposer's Declaration		
Topic	**Requirement**	**Proposer's declaration**
RfP response:	The Proposer has prepared this Proposal independently to supply the goods/services. **OR** jointly with [insert name of Proposer #2] **OR** in consortium with [insert names of consortium Proposers]	**agree / disagree**
RfP terms and conditions:	The Proposer has read and fully understands this RfP, and the RfP Terms and Conditions, and agrees to be bound by them.	**agree / disagree**
Collection of further information:	The Proposer authorises Otago Polytechnic to: a. collect any information about the Proposer, except commercially sensitive pricing information, from any relevant third party, including a referee, or previous or existing client b. to use such information in the evaluation of the Proposal. The Proposer agrees that all such information will be confidential to Otago Polytechnic.	**agree / disagree**
Deliverables:	The Proposer has read and fully understands the nature and extent of the deliverables required by Otago Polytechnic as described in the RfP. The Proposer has the necessary capacity and capability to fully meet or exceed the deliverables and will be available to deliver throughout the relevant contract period.	**agree / disagree**
Conflict of interest:	The Proposer warrants that it has no actual, potential or perceived conflict of interest in submitting this Proposal, or entering into a contract to deliver the Requirements. Where a conflict of interest arises during the RfP process the Proposer will report it immediately to Otago Polytechnic's Authorised Representative.	**agree / disagree**
Ethics:	The Proposer warrants that in submitting this Proposal it has not: a. entered into any improper, illegal, collusive or anti- competitive arrangements with any competitor b. directly or indirectly, approached any representative of Otago Polytechnic to lobby or solicit information in relation to the RfP (other than the Otago Polytechnic's Authorised Representative) c. has not attempted to influence, or provide any form of personal inducement, reward or benefit to any representative of Otago Polytechnic.	**agree / disagree**

Declaration:	The Proposer declares that in preparing this Proposal it: a. has provided complete and accurate information in all parts of the Proposal, in all material respects b. has secured all appropriate authorisations to submit this Proposal and is not aware of any impediments to its ability to enter into a formal contract to deliver the Requirements. The Proposer understands that should it be successful in being awarded a contract with Otago Polytechnic then the falsification of information, supplying misleading information or the suppression of material information in relation to this RfP will be grounds for termination of the contract.	**agree /** **disagree**

DECLARATION

This Proposal has been approved, and is signed by, a representative of the Proposer who has the authority to do so. This representative is named below.

This representative declares that the particulars provided above and in the attached

Proposal documents are accurate, true and correct.
