SCOPE OF SERVICES – ESTATE STRATEGIC PLANNING

1. **Background**
   1. Defence’s strategic direction is reflected in Defence White Papers, Defence Strategic Updates, Force Structure Plans, ADF preparedness requirements and other Government commitments.
   2. The ‘Defence Estate Strategy’ is the key estate strategic planning reference document used to link Defence’s strategic intent with the Defence estate vision of “*A strategically aligned, affordable, safe and sustainable estate that enables Defence capability and operations*”.
   3. The ‘Defence Environmental Strategy’ is the sister document to the Defence Estate Strategy, which sets a whole of Defence approach to the Defence Environmental Vision “*Defence will be a leader in sustainable environmental management to support the ADF capability to defend Australia and its national interests*”. Related policies, programs and projects all need to be factored in estate strategic plans to achieve wider Defence estate outcomes.
   4. The Defence estate is recognised as a critical enabler and a ‘Fundamental Input to Capability’, with Deputy Secretary Security and Estate the responsible Capability Manager. This enhances Security and Estate Group’s role within the ‘One Defence’ business model and related engagement with Central Agencies, the Defence Centre, Capability Managers and Capability Program leads.
   5. Security and Estate Group is also responsible for the management and delivery of the ‘Enterprise Estate & Infrastructure Program’, a twenty (20) year strategic investment portfolio within the Defence Integrated Investment Program. Estate sustainment plans need to consider emerging capabilities, technologies and changes to policy, priorities and ADF and community expectations.
   6. In light of the above, estate planning activities are becoming increasingly complex. Estate Strategic Planning services therefore need to be agile, flexible and include a range of planning scenarios to work towards a modernised, secure and safe property, base or establishment.
2. **Commonwealth Objectives**
   1. The objective of the Services provided by the Consultant is to undertake a range of strategic planning activities to inform Defence estate related actions and associated investment decisions within Defence, and by the Commonwealth.
   2. The Services will align to Commonwealth and departmental policies, plans and priorities, informed by, and to inform, Force posture, the Defence Integrated Investment Program and related decision making.
3. **Skills and Qualifications**
   1. The Commonwealth requires suitably skilled persons to be offered by the Consultant, matched to the specific needs of the Services.
   2. Services under this Service Category will require appropriate Commonwealth Security Clearances, as appropriate for each engagement (consisting of Baseline, Negative Vetting Level 1 and Negative Vetting Level 2 and a mixture thereof).
4. **Services**

**General**

* 1. The Consultant must be able to provide the Services, as and when directed by the Commonwealth, and in accordance with the timeframes outlined by the Commonwealth's Representative.
  2. The Consultant must have and maintain for the term of the Engagement an in-depth understanding of all relevant Statutory Requirements and policy frameworks relevant to delivery of the Services, including any relevant applicable Australian and international standards and Commonwealth policy.
  3. The Consultant must provide deliverables as specified for a particular Engagement including reports, papers, reviews and advices.
  4. Deliverables from the Consultant should be applied in an appropriate context to enhance the Commonwealth's decision making, reporting and public consultation.
  5. The Consultant may be required to attend and participate in meetings as specified for a particular engagement including integrated project team meetings and presentations to key stakeholders.
  6. The Consultant may be required to travel to Defence sites or other locations as part of delivering the Services.

**Specific**

* 1. The Consultant will be required to undertake a diverse range of strategic estate planning functions, including, but not limited to, ‘Estate Disposition’ analysis, ‘Strategic Estate Feasibility Studies’ and Defence ‘Estate Base Plans’.
  2. Specific service activites would include, but are not limited to:
     1. Strategic estate options analysis, prior to undertaking strategic stakeholder engagement;
     2. Facilities and Training Area ‘Fundamental Input to Capability’ assessments;
     3. Formulating strategic estate vision and purpose statements;
     4. Capability Program needs and requirements assessments;
     5. Estate property and/or asset ‘Condition, Capacity, Compliance and Fitness for Purpose’ assessments;
     6. Undertaking strategic estate feasibility studies and development of estate planning artefacts;
     7. Development of socio-economic analysis and community engagement plans;
     8. Assessment and integration of urban and environmental planning concepts, in combination with other Commonwealth/State/Local Government areas plans and policies;
     9. Scenario planning and site options analysis;
     10. Investment logic and/or benefit realisation mapping;
     11. National, regional or base level engineering services investigations and development of technical reports or memoranda;
     12. Strategic estate risk (and risk profile) assessments;
     13. Land use, spatial, estate regulation and estate development control considerations and options;
     14. Investment/reinvestment priorities for base re-development, estate infrastructure requirements, or investment programs/projects;
     15. Limited architectural related services, such as floor plan sketches, building footprint changes, 3D modelling, digital and traditional scale modelling;
     16. Supporting desktop, rough order magnitude and/or P50 costings.

**Specific for Estate Base Plans only:**

* 1. Defence ‘Estate Base Plans’ will be developed for current and new Defence Bases, Establishments, Properties and Training Areas:
     1. Defence ‘Estate Base Plans’ may be for singular or grouped sites. An Estate Base Plan represents an enterprise view on how the future vision and investment at the base will support current and future capability over the short, medium and long-term (25+ years). An Estate Base Plan integrates a number of Defence-wide inputs, including Capability Domain/Program plans, Service/Group strategic infrastructure plans, ADF operational scenarios and changes to the design of the future force in support of the Defence Mission. Estate Base Plans are therefore designed to inform the Defence Capability Assurance Program (Force Design process), Integrated Investment Program prioritisation and the related estate risk profile to the Defence Strategic Objectives.
     2. At a minimum, an ‘Estate Base Plan’ must include the following:
        1. A ‘strategic’ Base vision, developed following Domain, Multi-Domain, Capability Program, Joint and Service/Group HQ and other key stakeholder engagements;
        2. A separate ‘strategic’ Executive Summary with supporting maps and plans;
        3. A ‘strategic’ Base Overview, Analysis and Risk Assessment Report;
        4. A ‘Defence Estate Strategy’ and ‘Estate Design and Use Principles’ Assessment Report, supported by investment logic mapping, risk and benefits analysis and investment targets;
        5. De-conflicted reinvestment priorities for the Base and/or Training Area Estate Projects, with Rough Order Magnitude and/or P50 confidence costings, and supporting Whole of Life/Cost Benefit Analysis;
        6. Other plans which may include Property Disposition Plans, Zone and Precinct Plans (showing security layers), site Master Plans, Flight Line Master Plans (for air bases), Constraint Mapping Plans, strategic Asset Management Plans, environmental and estate related climate change adaptation/impact plans; and
        7. Estate Base Plan related data products, to update estate data within the Garrison and Estate Management System (i.e. Updated Estate Register asset data, Geospatial data - as specified within the Brief).
  2. The Consultant may also be required to provide advice and information to ensure other parties discharge their obligations in relation to progressing a separate project or estate planning outcome.
  3. For the avoidance of doubt, nothing in this Scope of Services should be read as requiring the provision of legal services. If the Commonwealth requires associated legal advice it will procure these services separately.
  4. Depending on the Commonwealth's strategic direction, estate strategic plans may be procured on a single basis, but in some cases a package or bundle of plans may be procured by the Commonwealth. To ensure project risks that may lead to a perceived or actual conflict of interest between and within the Services is contained at an acceptable level to the Commonwealth and without limiting the terms of the Panel Agreement, the Commonwealth may impose appropriate segregation of appointment, contracts and service providers in any subject or activity area that requires independent assessment and/or reporting.

1. **Interpretation** 
   1. Unless the context otherwise requires, capitalised terms in the Scope of Services or Brief will have the meaning given to them by the Defence Infrastructure Panel 2022-2027 Terms of Engagement, Panel Conditions, Official Order, or the meaning given to them by the Commonwealth as published on the Defence website (<https://www.defence.gov.au/business-industry>), from time to time.