27 August 2024

Tēnā koe

CROWN FORESTRY RENTAL TRUST - Request for Proposals

Crown Forestry Rental Trust is currently seeking proposals from suitably qualified persons to undertake a "Scoping Report on the History of the Trust" project. A Project Brief for this project is attached. Please note that the brief is subject to modification following consultation with a preferred provider/s.

General information about the request for proposals process is included on the following pages, including information about what should be included when submitting a proposal.

It is expected that those submitting a request for proposal will have completed or will apply to complete the Trust's Approved Provider Process. Documentation for this can be obtained from Anita Miles.

All proposals must be signed and forwarded to:

Anita Miles
Principal Advisor Funded Services
anita.miles@cfrt.org.nz
Crown Forestry Rental Trust

no later than **5pm**, **17 September 2024.**

Nāku noa, nā

Anita Miles

Crown Forestry Rental Trust – The History of the Trust project

CFRT is presently seeking proposals from providers for the commissioning of the project listed below.

Project
Scoping Report on the History of the Trust project

A project brief is attached at Appendix I.

Timetable and budget

Your proposal should include information about key personnel who will undertake the project, including all research assistance if required, their qualifications and relevant experience, and an estimate of scope, sources, timeframe, and detailed budget breakdown for the project. It is expected that those submitting proposals would have completed or applied to the Trust's Approved Provider Process.

Trust contact

Any questions on the project or the proposals document, selection process, and contracting procedures should be directed to:

Anita Miles
Principal Advisor Funded Services
Crown Forestry Rental Trust
0212471544
anita.miles@cfrt.org.nz

PROPOSAL REQUIREMENTS

Prospective providers are requested to submit their proposals incorporating the following information.

Please include:

Contact details: The Principal's name, address, phone, and email.

Project description: An outline on how the contractor will undertake the work, the sequence of work, sources and repositories of information, how the research will be collated and presented and so on. The project description will also set out stages (milestones) of the work to be undertaken so that the Trust can get a sense from the provider of their proposed methodology and be able to measure progress. This would also help with forming the details in the subsequent contract with the successful provider. The project description will also set out the timeframe for completing the project, including the proposed start and end dates, and building in at least a fortnight for the Trust feedback on the draft output. Any information that could impact on the timeframes for the project should also be noted.

Project team: Set out the principal (role and work they will undertake); other team members (role/ work performed by each), their experience that is directly related to the project, other research experience and relevant qualifications.

Timetable/resources and costs:
This will set out the contractor's proposal in terms of:

- The start and finish date for the work;
- Intermediary steps (milestones) and dates. This information should be submitted in the form of a Gantt Chart or project timeline. It should indicate the roles of all personnel involved in the project.
- Personnel costs including an hourly rate excluding GST;
- Overheads (These should be identified separately, not in personnel costs, with an explanation on what the overheads cover);
- Itemised estimates of the disbursements (e.g. photocopying, accommodation, and travel – note that IRD car mileage allowances already includes GST); and
- Total costs (all costs excluding GST). Note the Trust will calculate eligible GST.

Selection:
The selection of suitable providers will be based on the following key attributes:

- Relevant experience;
- Previous track record;
- Organisational capability;
- Team composition;
- Quality of report writing;

- Cost estimates;
- Level of detail in the proposal document.

Next steps

Proposals are to be received by email no later than **5pm,17 September 2024**. An internal Trust committee comprising the Principal Advisor Funded Services, Senior Business Analyst, and a Senior Advisor - Assurance will assess proposals and make a recommendation on the preferred provider(s) to the Trust's Chief Executive.

All submitters will be notified by email or phone within 10 working days of close of proposals of the decision of the selection panel.

The preferred provider(s) will then enter into contract negotiations with the Trust on the details of the work to be undertaken.

Appendix I: Project Brief

Project brief: Scoping Report for The History of the Trust project

Project Sponsor	Trustees of the Crown Forestry Rental Trust
Project Management	Principal Advisor Funded Services & Business Analyst
Timeframe	Approximately 8 weeks full-time FTE (negotiable)

Background: The Crown Forestry Rental Trust and Trustees

The Crown Forestry Rental Trust (**the Trust**) is a common law trust established pursuant to a deed of trust dated 30 April 1990.[1] It is a direct outcome of the settlement of litigation between Māori interests (represented by Sir Graham Latimer and the New Zealand Māori Council) and the Crown over the Crown's proposed sale of Crown-owned exotic forests in the 1980s.

The Crown Forest Assets Act 1989 allowed the Crown to sell licences for forestry, but prevented it from selling the land itself until the Waitangi Tribunal recommends who has ownership of the land – Māori or the Crown.

The Crown Forestry Rental Trust ('the Trust'):

- operates within a Trust Deed;
- provides funding to eligible Māori claimants to prepare, present and negotiate claims against the Crown, which involve, or could involve, Crown forest licensed lands, and
- reports annually to the Minister of Finance, who is the Trustees' Crown appointor, and to the New Zealand Māori Council (NZMC) and Federation of Māori Authorities Incorporated (FOMA), who are jointly the Trustees' Māori Appointor.

The Trust funds come from annual rental fees for licences to use certain Crown forest licensed lands. Until the beneficial owners of the lands have been determined, the Trust:

- invests the rental proceeds and holds them in trust, and
- applies the interest earned on the rental proceeds to help eligible Māori claimants prepare, present and negotiate claims which involve or could involve Crown forest licensed lands.
- The accumulated rental fees for all Crown forest licensed lands are returned to successful claimants who are the confirmed beneficiaries as a result of achieving negotiated settlements with the Crown. If, at the end of the Trust's operational life, it retains any Trust funds (which have not been returned to successful claimants), these funds will be returned to the Crown.

Further information on the Trust can be found at the Trust's website: www.cfrt.org.nz .

[1] As amended and restated by the High Court on 26 September 2018.

The Trust's Māori-appointed Trustees are Paul Majurey, Annette Sykes and Bronwyn Koroheke. The Trust's Crown-appointed Trustees are Rakihia Tau (Chairperson), Lynell Huria and the Hon Tau Henare.

The History of the Trust Project

The Trust proposes to undertake a "History of the Trust" project in order to record the unique nature of the Trust, its role as a funding agency, and its contributions over decades to the settlement of historical Treaty of Waitangi claims.

Trustees wish to explore the feasibility of a three-part project comprising of:

a) Oral interviews with fromer Trustees, staff and appointors;
b) A paper on the History of the Trust;
c) A bibliography of Trust-commissioned research reports.

Purpose of the Scoping Report

The Scoping Report for the History of the Trust project (**the Scoping report**) will provide Trustees with all required planning and budget advice to successfully undertake the substantive History of the Trust project components.

The Contractor will offer advice and recommendations to Trustees as to the most effective and efficient way of organising a History of the Trust Project. The Scoping report will explore and evaluate the feasibility and logistics of all project parts, as well as addressing the relevance of any recommended substantive projects to the Trust's legacy and to Māori PSGEs and former Approved Clients.

The Scoping report will outline the tasks and sources that are required to prepare a full project. The Scoping should address questions of: methodology; issue identification; output formats and structure; sources; required expertise; resources and human resource issues, including ethics; quality control; and substantive project time frames. The issue of intended audience for each of the proposed project outputs, should also be addressed.

Time frames for the Scoping

Taking into account time allowed for proposals to be received and assessed, and a provider to be contracted, the Trust prefers that the Scoping report be undertaken between September and November 2024 (however, the Trust remains flexible to accommodate the availability of its eventual preferred provider).

A: Oral Interviews

Trustees are inclined to prioritise the oral interviews for the History of the Trust project to ensure that key informants and perspectives are captured and not lost to the project.

The Scoping Report on the History of the Trust will address the following issues, and any other matters that the Contractor deems relevant:

(a) Identify suitable interview subjects for a History of the Trust project from amongst former Trustees, staff and appointors (and any other persons proposed to interview) and provide contact details and locations of interviewees;
(b) Discuss in general what experience and knowledge the selected interviewees bring to the project and the themes to be addressed in their interviews;
(c) Confirm whether potential interview subjects are willing to be interviewed for the project;
(d) Identify whether interviews would be individual interviews or small-group interviews;
(e) Identify whether all or some interviews will be in person or online;
(f) Make recommendations as to the number of interviews to be carried out, and the impacts on the budget so that decisions around costing an agreed number of interviews are clear;
(g) Confirm what logistical considerations for the interviews are required and how this informs costs;
(h) Whether interviews will be visually recorded as well as digital sound recordings;
(i) Identify whether interviews will be in English, Te Reo Māori, or both;
(j) Produce sample questionnaire and thematic guidance for different interviewee types;
(k) Make recommendations as to the processing of the interviews, e.g., abstracting, transcription and translation and editing and the costs for this;
(l) Policies and procedures for maintaining records of interviews, including the preservation and security of recordings and transcripts.
(m) Ethical considerations of oral interviews, including consent forms, informant sign-off of transcripts, and reference to NOHANZ[2] approved interview protocols.

The Scoping report will also address what the intended final product will be, i.e., whether transcripts will be edited and collated and potentially published, or made available on the Trust's website, or whether interview recordings and transcripts will be lodged in Alexander Turnbull Library for posterity, or any other option.

The Scoping report should contain firm recommendations as to the interview subjects, costs and outputs so that Trust staff and Trustees are able to confidently proceed to undertaking the interview stage of the project.

B: A paper on the History of the Trust

The Contractor will provide advice and recommendations concerning the production of an historical paper on the History of the Trust. The Scoping report will contain advice as to the key themes, questions and issues that a paper should cover. The Scoping report should also identify primary, secondary and oral sources that will inform this paper. A working bibliography will be provided for this section of the project.

Some ideas for appendices of information about the Trust include:

(a) A list of Trustees and their terms and whether a Crown or Māori appointee;
(b) A timeline of key Trust dates, events and achievements

[2] Te Kete Kōrero-a-Waha o Te Motu / National Oral History Association of New Zealand

(c) A list of all Crown Forest Licensed Land, and which PSGEs the forests and the rentals were transferred to and under what settlements

C: Bibliography of Trust-commissioned Research

The Trust's enduring legacy is the wealth of historical research and mapping it had produced over time for Approved Clients and Waitangi Tribunal inquiries. The Trust wants the Contractor to explore the merits of commissioning a bibliography of those Trust-commissioned reports, including where they can be accessed.

The Trust notes that the Waitangi Tribunal has produced a three-part "Waitangi Tribunal Bibliography - Tribunal Reports, Publications and Research Reports Presented in Evidence 1975-2020" available on its website. This product also includes Trust-commissioned research reports and mapping products. The reports are ordered both by author and by region.

The Contractor will provide advice as to:

(a) the merits of a separate Trust bibliography;
(b) whether a bibliography could potentially include research reports and mapping products not filed on Waitangi Tribunal records of inquiries;
(c) whether post-2020 Trust commissions could be included in a bibliography to complement the Tribunal-produced bibliography;
(d) advice as to any intellectual property and confidentiality issues arising;
(e) the format of a bibliography, e.g., as a Word document or an Excel spreadsheet, and how a potential bibliography is best structured; e.g., by region, by client, by inquiry, by author or some other way;
(f) the uses of such a bibliography, such as the disposition of Trust records to former Approved Clients when the Trust winds up.

Methodology

The Scoping report will propose full methodologies and process steps for each component part of the History of the Trust Project.

Costings

One of the key aims of the Scoping report is to provide Trustees with advice as to the cost of a substantive History of the Trust project. Therefore, any and each option for project component parts must be fully costed with breakdowns, including hours, hourly rates and all probable expenses identified. It will not be sufficient or acceptable for a Scoping report to provide high-level global figures or estimates for future projects without breakdowns and rationale.

Advice around matters such as potential publishing costs for project outputs should be included in the Scoping report.

Sequencing and Project Dependencies

The Contractor will produce a proposed project plan and potenial timeline for the full History of the Trust project.

The Contractor will provide advice and recommendations as to any project dependencies between the substantive project parts, i.e., the interviews, the History of the Trust paper, and the bibliography of Trust-commissioned research. For example, it is recommended that all interviews are completed and processed before the paper on the History of the Trust is produced, or these can be undertaken independently.

Human Resources and Personnel

The Contractor will provide advice on the required skill sets and expereince of each of the three History of the Trust project components.

Consideration should be given as to whether the same provider can or should undertake one, two or all of the project parts ,and the reasons for that.

The Trust expects that the Contractor will develop specific lists and contact details of potential providers for the substantive History of the Trust project. This will assist the tendering of the main project components to suitably experienced people, both within and outside of the Treaty sector.

"Future-Proofing"Project Outputs

The Contractor will address the advantages and disadvantages of commencing a History of the Trust Project in 2024, while the Trust and its operations are ongoing.

Advice is required as to how the Trust updates or completes any project outputs at the conclusion of the Trust, and any methodological considerations.

Quality Assurance

The Scoping report will address matters of quality assurance and provide advice to Trustees as to appropriate quality assurance processes for each component of the project.

Feedback and Hui

The Contractor will produce a draft Scoping report for feedback from Trust staff, before finalising the Scoping report.

Potentially the Contractor may be required to attend a Trustee meeting with Trustees to speak to the Scoping report's recommendations and advice if required.

Contracting and Reporting

The Contractor will be contracted directly to the Crown Forestry Rental Trust. The Contractor will report to Trust project managers via milestone progress reports and meetings as required. Trust staff will be available at any time for support and questions.

Format and Presentation

The Contractor will provide a hard and electronic copy of the draft and final Scoping reports in Microsoft Word to the Trust. The Contractor will fully proof and edit the final Scoping report, and ensure that it complies with the Trust's Style Guide.

The Scoping report will be fully referenced, indexed, and paginated with an electronic table of contents.