



AMENDMENT 005

The objective of Amendment 005 is to bring the following changes/additions to the Request for Proposals (RFP):

- A. Questions and Answers 9 to 16
 - B. Changes to the RFP
-

A. Questions and Answers

Question #9

What is NRCan's preference for how bidders provide sample work products: links to sites where material is publicly available or embedded files for all documents?

RESPONSE: Yes, that is fine

Question #10

For the R2 requirement, is it acceptable for the project start date to have been more than 5 years ago as long as the completion date was within the past 5 years?

Response: Yes

Question #11

The M3 requirement specifies that the bidder must submit two reports, "each report pertaining to at least two products in the identified product category." Does this mean both reports must cover multiple products? Or can each report cover a single product, but the product must be different for each report?

Response:

Yes, each report must pertain to at least 2 products in the identified product category, except in the case of HVAC where the 2 reports must cover 2 of the products listed.

Question #12

With the new amendment 2 requirements for the financial evaluation, can the estimated days be modified to reflect the level of work for each resource, with the total adding up to the days currently listed for each product category? For example, the total days for all resources for the initial period would add up to 250 days for appliances. Otherwise, the financial evaluation will not reflect expected, reasonable staffing levels.

Response: Please see revised this amendment 5 for the revised financial evaluation

Question #13

According to the new financial evaluation in amendment 2, what number will be used to obtain the pricing score for each product category?

Response: Please see revised this amendment 5 for the revised financial evaluation

Question #14

Under amendment 2 question #3, can a report be used to satisfy the R2 requirements for more than one product category while receiving maximum points?



Response:

Yes, A report can be used to satisfy R2 requirement for more than one products category. Each product category will be evaluated separately

Question #15

Can a proposed Primary Resource be assigned to more than one product category; in other words, is it required that Primary Resources be different for all the bidder's participating product categories?

Response:

As long as the primary resource can show the required mandatories for each of the different product categories for which they are submitting bids.

Question #16

Amendment 2 modifies 4.1.2 Financial Evaluation to allow bidders to provide multiple rates per equipment category. The total estimated days for each of the four rates equal the total estimated days for the single rate featured in the original Financial Evaluation guidelines. Therefore, the total estimated days for each category is now quadrupled. Should bidders provide a per diem rate using the total estimated days as they currently stand, or should bidders divide the original total estimated days across the four rates?

Response: We are currently revising Amendment 2, please have a look at this Amendment 5, this will answer your question.

B. Changes to the RFP

Insert:

Solicitation Closes

At 02:00 PM EDT

On May 5, 2017

Delete:

**Solicitation Closes –
at – 02:00 PM EDT
on – May 1, 2017**

Insert:

1.2 Summary

1.2.1 The Department of Natural Resources Canada (NRCan), Office of Energy Efficiency (OEE), requires the professional services of qualified consultant (s) for the provision of technical support, research and analysis services on an “as and when requested” basis related to energy using products.

Multiple vendors may be awarded **Standing Offers** (SO) for the following equipment categories:

Delete:

1.2 Summary



1.2.1 The Department of Natural Resources Canada (NRCan), Office of Energy Efficiency (OEE), requires the professional services of qualified consultant (s) for the provision of technical support, research and analysis services on an “as and when requested” basis related to energy using products.

Multiple vendors may be awarded **Sanding Offers** (SO) for the following equipment categories:

Insert:

PART 3 – OFFER PREPARATION INSTRUCTIONS

3.1 Offer Preparation Instructions

Section I: Technical Offer (1 electronic copy per **Product Category**)

Section II: Financial Offer (1 electronic copy per **Product Category**) in a separate file

Delete:

PART 3 – OFFER PREPARATION INSTRUCTIONS

3.1 Offer Preparation Instructions

Section I: Technical Offer (1 electronic copy)

Section II: Financial Offer (1 electronic copy) in a separate file



Insert:

4.1.2 Financial Evaluation

The all-inclusive firm per diem rate for the completion of this project is in Canadian funds and does not include applicable taxes

Technical Support Services Related to Energy Using Equipment

Offerors should submit a Financial Offer in response to this RFSO for the equipment categories listed below. A separate Financial Offer is requested for each equipment category for which the Offeror is submitting a bid.

Note: pricing for option periods must NOT BE LESS THAN pricing for the previous period. In the event of future pricing being less than previous period pricing, Natural Resources Canada (NRCan) reserves the right to change future pricing to equal the highest previous per diem rate for the category.

Table A:

Product Category	Per Diem Rate for Primary Resource						TOTAL (a x b) + (c x d) + (e x f) = (g)
	Proposed Period of Contract						
	Initial Period (24 months)	Total Est. Days	Option Period 1 (12 months)	Total Est. Days	Option Period 2 (12 months)	Total Est. Days	
	(a)	(b)	(c)	(d)	(e)	(f)	
1. Appliances	\$ _____	250	\$ _____	75	\$ _____	25	\$ _____
2. Commercial Refrigeration	\$ _____	125	\$ _____	50	\$ _____	25	\$ _____
3. Lighting products	\$ _____	200	\$ _____	75	\$ _____	25	\$ _____
4. Electronics (Consumer Electronics & Office Equipment)	\$ _____	125	\$ _____	50	\$ _____	25	\$ _____
5. Industrial Equipment (electric motors & motor driven & transformers)	\$ _____	125	\$ _____	50	\$ _____	25	\$ _____
6. HVAC (Space heating, space cooling, ventilation, & water heating)	\$ _____	350	\$ _____	150	\$ _____	50	\$ _____
7. Window & door Systems	\$ _____	50	\$ _____	25	\$ _____	25	\$ _____
8 Multi Equipment	\$ _____	50	\$ _____	25	\$ _____	25	\$ _____

Total of Column G is for evaluation purposes only for each Product Category.



Table B: Additional/Support Staff

This table will not be used as part of the Financial Evaluation.

Resource Category	Ceiling Rates
1. Senior Engineer/analyst	\$
2. Engineer/analyst	\$
3. Admin support	\$
4. add more lines as required

Note: NRCan reserve the right to correct arithmetical errors based on the per diem rates submitted by the offerors (columns a, c, e).

*** LEVEL OF EFFORT PRESENTED HEREIN IS USED FOR EVALUATION PURPOSES ONLY AND IT'S NOT A COMMITMENT BY CANADA.**

**** FOR ANY ERRORS IN THE CALCULATION, THE PER DIEM RATE SCHEDULE WILL BE UPHELD.**

Any estimated level of effort specified in the Pricing Details detailed above is provided for financial proposal evaluation purposes only. It is only an approximation of the requirements and is not to be considered as a contract guarantee nor as a commitment by NRCan to respect those estimated in any resulting contract

Delete:

4.1.2 Financial Evaluation

The all-inclusive firm per diem rate for the completion of this project is in Canadian funds and does not include applicable taxes

Technical Support Services Related to Energy Using Equipment

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Table A:

Equipment Category	Per Diem Rate	
	Proposed Period of Contract	



	Initial Period (24 months)	Total Est. Days	Option Period 1 (12 months)	Total Est. Days	Option Period 2 (12 months)	Total Est. Days	TOTAL (a x b) + (c x d) + (e x f) = (g)
	(a)	(b)	(c)	(d)	(e)	(f)	(g)
1. Appliances	\$ _____	250	\$ _____	75	\$ _____	25	\$ _____
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8 Multi Equipment	\$ _____	50	\$ _____	25	\$ _____	25	\$ _____
Total for evaluation purposes only:							(sum of all above figures)

Table B: Additional/Support Staff

Resource Category	Ceiling Rates
1. Senior Engineer/analyst	\$ _____
2. Engineer/analyst	\$ _____
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4. add more lines as required

Note: NRCan reserve the right to correct arithmetical errors based on the per diem rates submitted by the offerors (columns a, c, e).



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Insert:

4.2.1 Highest Combined Rating of Technical Merit and Price

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria; and
 - c. obtain the required minimum of 75 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 142 points.
2. Bids not meeting (choose "(a) or (b) or (c)" OR will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70% for the technical merit and 30% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70%.
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30%.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.
8. **Up to three (3) suppliers with the highest combined rating of technical and financial score will be selected for award of contract for each product category.**

The responsive (compliant) Bidder with the highest combined rating of technical merit (70%) and price (30%) will be recommended for award of a contract. See the following example table below.

Example of 70% Technical Merit and 30% Price Determination per Product Category			
	Bidder 1	Bidder 2	Bidder 3
Technical Points Achieved by Bidder	88	82	76
Price Quoted by Bidder	\$85,000	\$80,000	\$75,000
CALCULATIONS			
	Technical Points Achieved	Rated Price Points Achieved	Total Points Achieved
Bidder 1	$\frac{88 \times 70}{88} = 70.00$	$\frac{**75 \times 30}{85} = 26.47$	96.47
Bidder 2	$\frac{82 \times 70}{88} = 65.23$	$\frac{**75 \times 30}{80} = 28.13$	93.36
Bidder 3	$\frac{76 \times 70}{88} = 60.46$	$\frac{**75 \times 30}{75} = 30.0$	90.46
* Represents the highest technical score			
** Represents the lowest priced proposal			

Assumption: Three responsive (compliant) bids have been received. The maximum technical score that can be obtained is 100 points. The highest technical score and lowest bid price receive full rated percentage and other proposals are prorated accordingly.

The winner is the Bidder scoring the highest Total Points as a result of applying the Best Value Calculations to the technical bid and the bid price respectively. Based on the above calculations a contract would be awarded to Bidder 1.



Delete:

4.2.1 Highest Combined Rating of Technical Merit and Price

1. To be declared responsive, a bid must:
 - a. comply with all the requirements of the bid solicitation; and
 - b. meet all mandatory criteria; and
 - c. obtain the required minimum of 70 points overall for the technical evaluation criteria which are subject to point rating. The rating is performed on a scale of 140 points.
2. Bids not meeting a, b and c will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 60 % for the technical merit and 40% for the price.
4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 60 %
5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 40%.
6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.
7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted.
- 8. Up to three (3) suppliers with the highest combined rating of technical and financial score will be selected for award of contract for each product category.**

The table below illustrates an example where all three bids are responsive and the selection of the contractor is determined by a 60/40 ratio of technical merit and price, respectively. The total available points equal 135 and the lowest evaluated price is \$45,000 (45).

Basis of Selection - Highest Combined Rating Technical Merit (60%) and Price (40%)			
	Bidder 1	Bidder 2	Bidder 3
Overall Technical Score	115/135	89/135	92/135
Bid Evaluated Price (sum of column "g")	\$55,000.00	\$50,000.00	\$45,000.00
Calculations	Technical Merit Score	$115/135 \times 60 = 51.11$	$89/135 \times 60 = 39.56$
	Pricing Score	$45/55 \times 40 = 32.73$	$45/50 \times 40 = 36.00$
Combined Rating	83.84	75.56	80.89
Overall Rating	1st	3rd	2nd

Insert:



4.0 Scope

Technical Support Services Related to Energy Using Products categories:

1. Appliances
2. Commercial Refrigeration
3. Lighting
4. Electronics
5. Industrial Equipment
6. Heating, Ventilation and Air Conditioning Equipment
7. Window & Door Systems
8. Multi–Equipment

The products for each category of energy using equipment are detailed in Attachment 1 to Annex “A”
- *List of Product Categories.*

Delete:

4.0 Scope

Technical Support Services Related to Energy Using Products categories:

9. Appliances
10. Commercial Refrigeration
11. Lighting
12. Electronics
13. Industrial Equipment
14. Heating, Ventilation and Air Conditioning Equipment
15. Window & Door Systems
16. Multi–Equipment

The products for each category of energy using equipment are detailed in Attachment 1 to Annex “A”
- *List of Product Categories.*

Insert:

5.0 Requirement – Primary Resource (Technical Support)

For each category of equipment for which a bid is made as listed in 4.0, the Bidder must propose a qualified Primary Resource in the role of “Technical Support” to conduct the work. Additional resources may be used to perform a portion of the work under the direction of the Primary Resource. Should the Primary Resource end his or her affiliation with the bidding company during the term of a contract with NRCan, the contractor must show that the replacement resource has the required qualifications as set out in this document, and be approved by NRCan prior to conducting any work.

Delete:

5.0 Requirement – Primary Resource (Technical Support)



For each category of equipment for which a bid is made as listed in 4.1, the Bidder must propose a qualified Primary Resource in the role of “Technical Support” to conduct the work. Additional resources may be used to perform a portion of the work under the direction of the Primary Resource. Should the Primary Resource end his or her affiliation with the bidding company during the term of a contract with NRCan, the contractor must show that the replacement resource has the required qualifications as set out in this document, and be approved by NRCan prior to conducting any work.

ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED