



REQUEST FOR PROPOSALS

CRTC FY 2017/18 RFP # 18-0001

OPERATOR OF THE NATIONAL DO NOT CALL LIST

APPENDIX B

SELECTION AND EVALUATION CRITERIA

1. EVALUATION METHODOLOGY

- 1.1 Selection and evaluation is based on a “rules of evidence” approach, such that the Bidder’s Proposal is the sole demonstration of the Bidder’s capacity to fulfill the requirement, as described within the request for proposal. No prior knowledge of or experience with the Bidder on the part of the proposal evaluation committee will be taken into consideration.
- 1.2 Bidders must ensure that their Proposal provides sufficient evidence for the evaluation committee to assess the compliance of the Proposal with the criteria listed herein. It is the sole responsibility of Bidders to provide sufficient information within their Proposal to enable the committee to complete its evaluation.
- 1.3 Bidders must include any reference material they wish to be considered for evaluation within their Proposal. Any material or documents outside the Proposal shall not be considered (for example, should the Bidder wish to provide screen shots of its website, etc. for evaluation, copies or printouts of website material must be included within the Proposal). Links to the Contractor’s website will not be considered by the evaluation committee.
- 1.4 If the information provided by a Bidder as part of a Project Summary is drawn from a Corporate entity’s experience, the onus is on the Bidder to demonstrate how this information is relevant to the Bidder’s capabilities to meet the rated items of this section.
- 1.5 If the Bidder is a Joint Venture or Partnership, the information provided to demonstrate the Bidder’s experience should only be based on the experience of the particular Joint Venture partner (or its corporate entity) that is named by the Bidder to carry out the related responsibilities in the National DNCL. The Bidder must propose one (1) of the Joint Venture members (or their corporate entities) to manage the National DNCL Project. The lead company in the Joint Venture **must** be clearly identified.
- 1.6 The term “Bidder” means, as applicable, the legal entity proposed as the Contractor to fulfill the work under any resulting Contract. In the case of a Joint Venture the term “Bidder” means each of the legal entities proposed as the Contractor to fulfill the work under any resulting Contract. In the case of a Consortium or Partnership, the term “Bidder” means the legal entity with authorization to sign any resulting Contract on behalf of the Parties.
- 1.7 To meet the requirements described herein, the experience of the Bidder must consist of work for which the Bidder was under contract to clients exterior to the Bidder’s own organization. In the case of Proposals submitted as a Joint Venture, the combined experience of the Parties forming the Joint Venture will be considered in the evaluation of the experience of the Bidder.
- 1.8 The onus is on the Bidder to demonstrate how information provided in its Proposal is relevant to its capability as a Contractor to meet requirements of the National DNCL as described in the Statement of Work.

Reference Checks

- 1.9 The CRTC reserves the right to contact the referenced Client Project Authorities to verify the accuracy of information provided by the Bidder. Failure on the part of the Bidder to provide accurate and current contact information may result in the Bidder’s Proposal being deemed non-compliant and being given no further consideration in the evaluation process. The CRTC reserves the right to forward the text provided by the Bidder on a contract reference to the identified Client Project Authority for verification purposes. The copy will be provided to the Client Project Authority in advance of the reference check. A reference check will then be conducted with the identified Client Project Authority to verify the various elements of the Contract/Project Summary reference. For any discrepancies resulting from the reference check, the CRTC will contact the Bidder in writing for a written clarification. The assessment of the Bidder’s original response for

the Contract/Project Summary will then be finalized taking into account the results of the validation process described herein.

Requests for Clarification

- 1.10 Should the CRTC require clarification on any information provided in the Bidder’s Proposal, the Bidder will be required to provide such clarification, in writing, to the Contracting Authority **within two (2) business days** of having received the request for clarification from the CRTC, unless otherwise agreed to in writing by the Contracting Authority. If the clarification is not provided within the stipulated time frame, that applicable area may be deemed non-compliant for a given Mandatory Criterion, or may receive a score of “0” for a Point-Rated criterion. No new information may be introduced within the Bidder’s response to a request for clarification.

Consideration of a Proposal by the Incumbent National DNCL Operator

- 1.11 The CRTC recognizes that there is an incumbent National DNCL Operator that designed, developed, and implemented the existing National DNCL in Canada, and that continues to operate, maintain and support this service until the end of the existing contract.
- 1.12 The evaluation of point-rated criterion #4 (R4) sets out a methodology for ensuring that all Bidders can compete fairly in the event that the incumbent National DNCL Operator submits a Proposal.

2. SELECTION METHODOLOGY

- 2.1 The Proposal evaluation process will be conducted by the CRTC. Consultants and subject-matter experts may assist the evaluation team. Non-government participants will be required to sign a Declaration of No Conflict of Interest and Declaration of Confidentiality prior to the commencement of the evaluation process.
- 2.2 The Bidder’s Proposal must meet all mandatory criteria for the Bidder’s Proposal to be considered for further evaluation. Failure on the part of the Bidder to meet any one (1) of the mandatory requirements will result in the Proposal being deemed non-compliant, and no further consideration will be given thereto.
- 2.3 Proposals meeting all mandatory requirements will be evaluated and assigned a score for each point-rated criteria, using the evaluation factors specified for each criterion.
 - 2.3.1 The Technical Proposal will be evaluated based on Point-Rated Criteria R1, R2 and R3. To be considered responsive, the Bidder must obtain a minimum of 55% of each of the rated points for R1, R2, and R3.
 - 2.3.2 Only the proposals that are considered responsive to the Technical Proposal will be further considered and evaluated. The Financial Proposal will be evaluated based on Point-Rated Criteria R4 and R5.
- 2.4 The Proposal that meets all of the mandatory criteria and that obtains the highest combined score on the point-rated criteria, based on the following weighting, will be will be recommended for award of a contract.

Section of Proposal	Evaluation Criteria	Weighting
Technical Proposal	R1 Bidder Experience	150 points, 40% of Technical proposal, 24% of all Point-Rated Criteria

375 points, 60% of Point-Rated Criteria	R2 Project Manager Resource	75 points, 20% of Technical proposal, 12% of all Point-Rated Criteria
	R3 Bidder's Project Plan and Proposed Architecture	150 points, 40% of Technical proposal, 24% of all Point-Rated Criteria
Financial Proposal 250 points, 40% of Point-Rated Criteria	R4 Bidder Costs	150 points, 60% of Financial proposal, 24% of all Point-Rated Criteria
	R5 Mark-up on Qualifying Costs	100 points, 40% of Financial proposal, 16% of all Point-Rated Criteria

- 2.5 In the event that more than one (1) proposal meets all of the mandatory criteria and receives the same score on point-rated criteria, the Bidder with the most relevant and similar experience to the National DNCL, as evaluated in point-rated criterion R1, will be selected as the winning proposal.
- 2.6 The CRTC reserves the right to refuse any and all Proposals received in response to this request for proposal, without incurring any obligation to any Bidder having responded. The CRTC reserves the right to award a Contract(s) to the compliant Bidder that best meets the CRTC's requirements, as described above, without incurring any obligation to any other Bidders having responded to this Request for Proposals.

3. MANDATORY REQUIREMENTS

MANDATORY REQUIREMENT #1	MEETS
<p>M1 Financial Capacity of the Bidder</p> <p>The Bidder must demonstrate, to the satisfaction of the CRTC, financial capacity to design, develop, implement, operate, maintain and support of the National DNCL, as set out in section 6.2 - Financial Capability, and Appendix C - Certifications, of this request for proposal.</p>	Y/N

MANDATORY REQUIREMENT #2	MEETS
<p>M2 Bidder Profile</p> <p>The Bidder must provide a company profile and resume demonstrating the Bidder's knowledge and experience in the provision of the design, development, implementation, operation, maintenance and support services relevant and similar¹ to the requirements of the National DNCL, as defined in the Appendix A - Statement of Work, during the past fifteen (15) years, as provided to two (2) or more different client organizations. Projects may be ongoing.</p> <p>At a minimum, the Bidder Profile must include:</p>	Y/N

<p>a) the full legal name of the entity submitting the Proposal and identification of the Bidder's proposed team (i.e. parties to the Proposal, including, as applicable, all joint venture or consortia members, partners or Sub-Contractors);</p> <p>b) Project Summaries for at least three (3), but no more than five (5), projects that were led and managed by the Bidder's Team for at least two (2) consecutive years, including:</p> <ul style="list-style-type: none">i. one (1) project demonstrating the experience of the Bidder's Team in providing design, development, implementation, operation, maintenance and support services relevant and similar¹ to the National DNCL that:<ul style="list-style-type: none">• was or is valued at a minimum of \$10 million (CAD);• consists or consisted of a design, development and implementation phase valued at a minimum of \$5 million (CAD); and,• consists or consisted of an operation, maintenance and support phase valued at a minimum of \$1 million per annum (CAD) for a minimum of two (2) years;ii. two (2) additional Project Summaries demonstrating the experience of the Bidder's Team in providing design, development and implementation services relevant and similar² to the National DNCL; and,iii. two (2) additional Project Summaries demonstrating the experience of the Bidder's Team in providing operation, maintenance and support services relevant and similar¹ to the National DNCL.iv. the following information for each Project Summary:<ul style="list-style-type: none">• The name of the client organization;• The value of the projects (in Canadian dollars) to the client organization;• The dates/duration of the project (in months and years) and the total resource level of effort (in days) for the duration of the project;• A description of the objectives, work performed and complexity of the project, as well as a summary of the Bidder's scope, role and deliverables; and,• The name, telephone number, and fax number (and e-mail address if available) of the Client Project Authority to whom the Bidder reported. <p>¹ For the purposes of Bidder Profiles, the term "services relevant and similar to the National DNCL", when applied in part or in whole to the operation, maintenance and support of such a service, is defined as services rendered in the provision of a system that comprises a database accessed by the public via the Internet, client services rendered by live</p>	
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<p>operators via telephone, and the processing of payments for transactions by the public.</p> <p>² For the purposes of Bidder Profiles, the term “services relevant and similar to the National DNCL” when applied only to the design, development and implementation of such a service, is defined as services rendered in the provision of a system that comprises a database accessed by the public via the Internet.</p> <p>Note 1: For the purposes of responding to requirement (b)(iii), Bidders may rely upon the same projects referred to in their response to requirement (b)(ii), or may refer to different projects.</p> <p>Note 2: All projects submitted by Bidders must be in direct relation to contracts that were entered into by the Bidder with the named client organization contained within the Contract/Project Summary. Bidders cannot use the Project Manager Resource’s experience obtained while working for or on behalf of another entity. Irrespective of the qualifications and experience of the proposed Resource, if the project was not contractually entered into and successfully worked on or completed by the Bidder, the Project Summary cannot be submitted as evidence of the Bidder’s compliance with M2.</p> <p>This provision will not be applied or interpreted to disqualify a Bidder from claiming experience earned by individuals or entities that are now part of the bidder’s business operation as a result of the bidders’ succession to the assets and experience of such individuals or entities, as a result of merger or acquisition.</p> <p>Note 3: The purpose of M2 is to ascertain if the Bidder has previously entered into and successfully completed projects that are similar and relevant to the National DNCL’s required services as described in the Statement of Work. The qualifications of proposed Resources are considered elsewhere in this RFP.</p> <p>Note 4: Any information provided in excess of the stipulated maximum number of Project Summaries within the Bidder’s Technical Proposal will not be evaluated.</p>	
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MANDATORY REQUIREMENT #3	MEETS
<p>M3 Project Manager Resources</p> <p>The Bidder must propose two (2) qualified named Resource(s) [One (1) Primary Resource and one (1) Back-up Resource] in the role of Project Manager to coordinate and oversee the design, development, and implementation of the National DNCL, and to ensure the continued operation maintenance and support services for the duration of any resulting Contract.</p> <p>At least one (1) named Project Manager Resources must be dedicated full-time by</p>	Y/N

the Bidder (i.e. 20 days/month) from the start date of any resulting Contract, and must be responsible for the management of the project for the period ending no less than six (6) months after the Operational Start Date of the National DNCL.

The Bidder must include within its Proposal a detailed curriculum vitae (CV) for each proposed Resource named in the Proposal that:

- a) includes a chronological account of all relevant work experience, education, and professional designations;
- b) demonstrates a minimum of seven (7) years of experience as a Project Manager that includes the coordination and oversight of design, development, and implementation of relevant and similar projects to the National DNCL¹ that was gained over the past fifteen (15) years in the performance of their duties in support of:
 - i. at least one (1) project valued at a minimum of \$10 Million (CAD) to the Client, or
 - ii. three (3) projects valued at a minimum of \$5 Million (CAD) to the Client; and,
- c) includes, for each project ~~that satisfies the above requirement~~ included in response to a) and b):
 - i. The name of the client organization;
 - ii. The value of the projects (in Canadian dollars) to the client organization;
 - iii. The dates/duration of the project (in months and years) and the total resource level of effort (in days) for the duration of the project;
 - iv. A description of the objectives and complexity of the project, as well as a summary of the Project Manager's scope, role and deliverables; ~~and~~,
 - v. Information that pertains to any of the evaluation factors assessed under Point-Rated Criterion #2 (R2); and
 - vi. The name, telephone number, and fax number (and e-mail address if available) of the Client Project Authority to whom the Project Manager reported.

¹ For the purposes of Project Manager experience, the term "projects relevant and similar to the National DNCL" is defined as projects that consists of information technology systems that provide services to the public via the Internet ~~and~~ or via telephone.

Note 1: Named Resource Experience gained during formal education shall not be considered work experience. All requirements for work experience shall be obtained in a professional work environment as opposed to an educational setting. Time for those students filling co-op terms are considered work experience provided they are related to the required services.

Note 2: The totality of experience provided for a) and b) for each named Project Manager Resource will be further assessed in Point-Rated Criteria #2 (R2).

MANDATORY REQUIREMENT #4	MEETS
<p>M4 Database and Data Processing</p> <p>As set in out, in part, in section 17.8 of Appendix A, Statement of Work, the Bidder must demonstrate that:</p> <ul style="list-style-type: none"> a) All aspects of data processing are conducted and only accessible in Canada. b) The database is located in Canada (i.e., the Bidder must provide the physical address of the facility where it propose to house the database). c) The database is physically independent from all other databases, directly or indirectly, that are located outside Canada. 	Y/N

MANDATORY REQUIREMENT #5	MEETS
<p>M5 Maximum Qualifying Costs and Mark-up</p> <p>The Bidder must <i>submit maximum allowable Qualifying Capital Costs and Qualifying Operating Costs¹</i> that, in total over the duration of the Contract, do not exceed \$25 million (CAD).</p> <p>The Bidder must submit an expected mark-up on Qualifying Capital Costs and Qualifying Operating Cost that does not exceed 40% on those costs over the duration of the Contract.</p> <p>Note: The maximum allowable Qualifying Capital Costs and Qualifying Operating Costs, and the expected mark-up on these costs, will be considered in establishing and approving Subscription Rates under section 41.5 of the <i>Telecommunications Act</i>, as set out in section 3 of Appendix A, Statement of Work.</p>	Y/N

¹ These terms are defined in Appendix A, Statement of Work

4. POINT-RATED CRITERIA

POINT-RATED CRITERION #1
<p>R1 Bidder Experience</p> <p>The Bidder will be evaluated based on the relevance of the experience gained during three (3) of the projects identified in response to Mandatory Criteria #2 (M2) as it relates to the work to be undertaken in the delivery of to the National DNCL.</p> <p>Note 1: The Bidder must identify the specific Project Summaries that will be the subject of evaluation for this criterion. Failure to do so, or to clearly and concisely identify how each of the three (3) projects address the evaluation factors for this criterion will result in a score of no points for that factor or project.</p> <p>Note 2: Any information provided in excess of the stipulated maximum number of Project Summaries within the Bidder's Technical Proposal will not be evaluated.</p>
WEIGHT
150 points (40% of Technical Proposal, 24% of all Point-Rated Criteria)
EVALUATION FACTORS & RATING SCALE
<p>For each project, up to five (5) points per factor, to a maximum of fifty (50) points per project.</p> <p>Factor #1: Volume of records and transactions managed by the database</p> <ul style="list-style-type: none"> • Below one (1) million records and below ten (10) thousand transactions per year (0 points) • Between one (1) and ten (10) million records and between ten (10) and one hundred (100) thousand transaction per year (3 points) • More than ten (10) million records and more than one hundred (100) thousand transactions per year (5 points) <p>Factor #2: Automated methods of accessing the database</p> <ul style="list-style-type: none"> • One (1) of the following three (3) access methods: online interactive website, interactive voice response (IVR) system, application programming interface (API) (0 points) • Two (2) of the following three (3) access methods: online interactive website, interactive voice response (IVR) system, application programming interface (API) (3 points) • All three (3) of the following three (3) access methods: online interactive website, interactive voice response (IVR) system, application programming interface (API) (5 points) <p>Factor #3: Types of transactions (excluding payments) requested by the public</p> <ul style="list-style-type: none"> • One (1) of the following three (3) transaction types: submit new records to the database, query records in the database, modify records in the database (0 points) • Two (2) of the following three (3) transaction types: submit new records to the database, query records in the database, modify records in the database (3 points) • All three (3) of the following three (3) transaction types: submit new records to the database, query records in the database, modify records in the database (5 points)

Factor #4: Classes of users accessing the database

- One (1) class of users (e.g., Consumers, Registrants, Subscribers) accessing the database (0 points)
- Two (2) or more classes of users (e.g., Consumers, Registrants, Subscribers) accessing the database (5 points)

Factor #5: Methods of accessing client services or technical support

- None of the following five (5) methods of accessing client services or technical support: e-mail, online chat, social media, fax, teletypewriter (0 points)
- One (1) of the following five (5) methods of accessing client services or technical support: e-mail, online chat, social media, fax, teletypewriter (1 points)
- Two (2) of the following five (5) methods of accessing client services or technical support: e-mail, online chat, social media, fax, teletypewriter (2 points)
- Three (3) of the following five (5) methods of accessing client services or technical support: e-mail, online chat, social media, fax, teletypewriter (3 points)
- Four (4) of the following five (5) methods of accessing client services or technical support: e-mail, online chat, social media, fax, teletypewriter (4 points)
- All five (5) of the following five (5) methods of accessing client services or technical support: e-mail, online chat, social media, fax, teletypewriter (5 points)

Factor #6: Provision of services in both official languages (English and French)

- All services provided in one of Canada's official languages (English or French) (0 points).
- All services provided in both of Canada's official languages (English and French) (5 points).

Factor #7: Processing of payment transactions

- Processed transactions using two (2) or more forms of payment (2 points)
- Processed transactions using two (2) or more forms of payment, and performed one (1) of the following three (3) additional functions: collection and remittance of taxes on transactions, processing of refunds of payments, processing of transactions that consist of multiple payments/rates/fees (3 points)
- Processed transactions using two (2) or more forms of payment, and performed two (2) of the following three (3) additional functions: collection and remittance of taxes on transactions, processing of refunds of payments, processing of transactions that consist of multiple payments/rates/fees (4 points)
- Processed transactions using two (2) or more forms of payment, and performed all three (3) of the following three (3) additional functions: collection and remittance of taxes on transactions, processing of refunds of payments, processing of transactions that consist of multiple payments/rates/fees (5 points)
- None of the above (0 points)

Factor #8: Value of payment transactions

- Processed transactions in amounts varying from under one hundred (100) Canadian dollars to fifty (50) thousand Canadian dollars or more (5 points)
- Processed transactions in amounts that do not encompass the above-mentioned range of amounts (0 points)

Factor #9: Validation of third party identity

<ul style="list-style-type: none"> • The project required the identity of third party individuals or organizations accessing the database via public-facing methods (e.g., interactive website, IVR) be verified using external sources of information (5 points) • The project did not require the identity of third party individuals or organizations accessing the database via public-facing methods (e.g., interactive website, IVR) be verified using external sources of information (0 points) <p>Factor #10: Federal government client organization</p> <ul style="list-style-type: none"> • The project required the Bidder to provide services directly to a Canadian federal government institution or agency that include the development, maintenance and support of a website that meets the Government of Canada’s requirements for usability, accessibility, interoperability and optimization for mobile devices (5 points) • The project required the Bidder to provide services indirectly to any government institution or agency (3 points) • The project did not require the Bidder to provide services to a Canadian federal government institution or agency (0 points)

POINT-RATED CRITERION #2
<p>R2 Project Manager Resource</p> <p>The named Project Manager Resources (primary and back-up) will be evaluated based on the relevance of their experience, as identified in response to Mandatory Criteria #3 (M3), to the work to be undertaken in the delivery of to the National DNCL</p>
WEIGHT
75 points (20% of Technical Proposal, 12% of all Point-Rated Criteria)
EVALUATION FACTORS & RATING SCALE
<p>Up to five (5) points per factor, to a maximum of twenty-five (25) points, for the extent of relevant experience of the Bidder’s named Project Manager Resources). The score for the primary named Project Manager Resource will be doubled and added to the score for the backup named Project Manager Resource, to obtain the final score for this evaluation criterion.</p> <p>Factor #1: Budget</p> <p>Relevant experience in developing and managing project budgets over the project life cycle, accurately forecasting costs and revenue/demand, and realizing efficiencies or preventing overruns.</p> <p>Factor #2: Planning</p> <p>Relevant experience in developing and managing detailed project plans and contingency plans over the project life cycle, in allocating work, in providing regular and accurate reports on the status of projects against plans, in identifying slippage, and in adapting plans based on evolving circumstances to ensure that projects are delivered on time.</p>

Factor #3: Risk Mitigation & Quality Control

Relevant experience in identifying and managing risk, in developing and implementing an effective quality management framework and processes aimed at ensuring that quality levels would be met or exceeded on an on-going basis, appropriate measures to identify and resolve quality issues, and realizing quality improvement over time.

Factor #4: Managing Transition

Relevant experience in leading and managing the transfer of responsibility for a service or project from one organization to another.

Factor #5: Stakeholder Relations & Certification

- The Project Manager holds a valid certification as a [Project Management Institute](#) Project Management Professional or AXELOS PRINCE2 Professional and has at least 2 years in managing complex projects for Canadian federal government institutions or agencies (5 points)
- The Project Manager does not hold a valid certification as a [Project Management Institute](#) Project Management Professional or AXELOS PRINCE2 Professional and has at least 2 years in managing complex projects for Canadian federal government institutions or agencies (4 points)
- The Project Manager holds a valid certification as a [Project Management Institute](#) Project Management Professional or AXELOS PRINCE2 Professional and has at least 2 years in managing complex projects for any other government institutions or agencies (3 points)
- The Project Manager does not hold a valid certification as a [Project Management Institute](#) Project Management Professional or AXELOS PRINCE2 Professional and has at least 2 years in managing complex projects for any other government institutions or agencies (2 points)

For factors 1-4, up to five (5) points based on the following rating scale.

5 points	Excellent	The Resource has provided examples, each of which contains very compelling evidence, the sum of which clearly demonstrates extensive experience ¹ in managing high complexity projects, and in exercising their functions across a wide breadth and depth of functional areas and technical subject matters.
4 points	Very Good	The Resource has provided examples, each of which contain sufficiently compelling evidence, the sum of which clearly demonstrates significant experience ² in managing high complexity projects as demonstrated by exercising their functions across a moderate breadth and depth of functional areas and technical subject matters.
3 points	Good	The Resource has provided examples, most of which contain some compelling evidence, the sum of which demonstrates sufficient experience ³ in managing high complexity projects as demonstrated by exercising their functions across a sufficient breadth and depth of functional areas and technical subject matters.
0 points	Less than Good	

<p>¹ “Extensive experience” means experience gained in managing:</p> <p>Factor #1: 2 or more projects over a period of at least 6 years;</p> <p>Factor #2, #3: 4 or more projects over a period of at least 11 years; and,</p> <p>Factor #4: 2 or more projects over a period of at least 3 years.</p> <p>² “Significant experience” means experience gained in managing:</p> <p>Factor #1: 1 or more projects over a period of at least 4 years;</p> <p>Factor #2, #3: 3 or more projects over a period of at least 9 years; and,</p> <p>Factor #4: 1 or more projects over a period of at least 2 years.</p> <p>³ “Sufficient experience” means experience gained in managing:</p> <p>Factor #1: 1 or more projects over a period of at least 2 years;</p> <p>Factor #2, #3: 1 or more projects over a period of at least 7 years; and,</p> <p>Factor #4: 1 or more projects over a period of at least 1 years.</p>
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POINT-RATED CRITERION #3	
R3	Bidder’s Project Plan and Architecture
The Bidder will be evaluated based on its proposed preliminary project plan, solution architecture, and approaches to the delivery of the National DNCL.	
WEIGHT	
150 points (40% of Technical Proposal, 24% of all Point-Rated Criteria)	
EVALUATION FACTORS & RATING SCALE	
Up to seventy (75) points per factor, to a maximum of one hundred and fifty (150) points, for the extent to which the Bidder’s Proposal will effectively and efficiently meet the requirements of the National DNCL.	
Factor #1: Preliminary Project Plan	
The extent to which the Bidder’s proposed integrated project plan provides for an effective and efficient approach to the design, development, implementation and transition of the National DNCL.	
75 points	Very Good The preliminary project plan identifies and describes all key deliverables, dependencies and risks, as well as contingency plans for mitigating delays and addressing risks, includes more than sufficient detail to provide a high degree of confidence that all functional components of the National DNCL will be delivered on time, and is based on a logical and appropriate sequence and

	schedule of events.
50 points Good	The preliminary project plan identifies and describes most key deliverables, dependencies and risks, as well as contingency plans for mitigating delays and addressing risks, includes sufficient detail to provide confidence that all functional components of the National DNCL will be delivered on time, and is based on a reasonable and appropriate sequence and schedule of events.
0 points Less Than Good	
Factor #2: Architecture of the National DNCL systems	
The extent to which the Bidder's proposed architecture for the National DNCL systems provides for an effective and efficient approach to the design, development, implementation, operation, maintenance and support of the National DNCL.	
75 points Very Good	The proposed architecture of the National DNCL systems provides a clear, complete and concise description of the high-level hardware and software architecture to support all of the functional components of the National DNCL set out in section 2.12 of Appendix A - Statement of Work , and clearly demonstrates that the proposed systems will be secure, resilient, scalable and are based on technologies that can be easily supported and maintained over the duration of the Contract.
50 points Good	The proposed architecture of the National DNCL systems provides a clear and concise description of the high-level hardware and software architecture to support most of the functional components of the National DNCL, and clearly demonstrates that the proposed systems will be secure, resilient, scalable and are based on technologies that can be supported and maintained over the duration of the Contract.
0 points Less than Good	

POINT-RATED CRITERION #4	
R4 Bidder Costs	The Bidder will be evaluated based on the maximum allowable Qualifying Capital Costs and Qualifying Operating Costs, as defined in Appendix A – Statement of Work, for the duration of the Contract that the Bidder submitted with its Proposal, and that the CRTC will consider in establishing Subscription Rates for the National DNCL.
WEIGHT	
150 points (75 <u>60%</u> of Financial Proposal, 24% of all Point-Rated Criteria)	

EVALUATION FACTORS & RATING SCALE

The Proposal(s) with the lowest maximum allowable Qualifying Capital Costs and Qualifying Operating Costs, in total over the duration of the Contract, will receive a score of 150 points for this evaluation criterion.

All other Proposals will be scored based on the following formula, rounded to the nearest point.

$$\frac{\text{Lowest Total Qualifying Costs}}{\text{Bidder's Total Qualifying Costs}} \times \text{Maximum possible score (150 points)}$$

$$\text{where Total Qualifying Costs} = \text{Qualifying Capital Costs}_{MAX} + \text{Qualifying Operating Costs}_{MAX}$$

Consideration of a Proposal by the Incumbent National DNCL Operator

The Functional Requirements set out in section 8 of Appendix A, Statement of Work, describe the current functionality of the National DNCL, with some exceptions (see below). The CRTC recognizes that the incumbent National DNCL Operator could continue operating, maintaining, and supporting the National DNCL without incurring significant capital costs. In the event that the incumbent submits a proposal that does not include any major modifications to the service (other than those identified below), and in order to promote fair competition as part of this request for proposals, the CRTC will waive up to \$5 million of any Bidder's Maximum Allowable Qualifying Capital Costs for the sole purpose of evaluating this criterion.

Qualifying Capital Costs that would be incurred by the incumbent and a non-incumbent will be excluded from the above-mentioned waiver. Bidders must clearly identify capital costs from the following four (4) categories of Common Qualifying Capital Costs that are excluded from the waiver. Bidders who do not clearly identify costs from these categories will not be eligible for the above-mentioned waiver.

- Acquisition of Information Management and Technology (IM/IT) hardware as set out in Schedule 1 of Appendix A, Statement of Work.
- The design, development and implementation of an online chat service for the provision of information and support to Consumers.
- The design, development and implementation of an application programming interface (API) that will enable Canadians to interact with the National DNCL using third party software applications.
- The (re)design and development of the National DNCL interactive website.

The formula for evaluating this criterion would then be modified as follows.

$$\frac{\text{Lowest Total Qualifying Costs}}{\text{Bidder's Total Qualifying Costs}} \times \text{Maximum possible score (150 points)}$$

$$\text{where Total Qualifying Costs} = \text{Qualifying Capital Costs}_{NET} + \text{Qualifying Operating Costs}_{MAX}$$

$$\text{where Qualifying Capital Costs}_{NET} = \text{Qualifying Capital Costs}_{MAX} - \text{Waiver}$$

$$\text{where Waiver} = \text{Qualifying Capital Costs}_{MAX} - \text{Common Qualifying Capital Costs}$$

$$\text{where Waiver} \leq \$5 \text{ million}$$

POINT-RATED CRITERION #5	
<p>R5 Mark-up on Qualifying Costs</p> <p>The Bidder will be evaluated based on the proposed mark-up on Qualifying Capital Costs and Qualifying Operating Costs, as defined in Appendix A, Statement of Work, over the duration of the Contract that the Bidder submitted with its Proposal, and that the CRTC will consider in establishing Subscription Rates for the National DNCL.</p>	
WEIGHT	
100 points (40% of Financial Proposal, 16% of all Point-Rated Criteria)	
EVALUATION FACTORS & RATING SCALE	
<p>Proposals that include a proposed mark-up on Qualifying Capital Costs and Qualifying Operating Costs of 40% will score no points for this criterion.</p> <p>Proposals that include an expected mark-up on Qualifying Capital Costs and Qualifying Operating Costs over the duration of the Contract that is lower than the maximum allowable mark-up on these costs of 40% will score 6 points for every full percentage point that the proposed mark-up, as submitted by the Bidder with its Proposal, is below the maximum allowable mark-up on these costs. To ensure clarity of the rating scale for this criterion, please see the following examples of scores.</p>	
Proposed Mark-up	Score
23%	100 points
24%	96 points
35.5%	24 points
38%	12 points
39.1 - 39.9%	0 points