

## **ANNEX D - TECHNICAL BID SUBMISSION REQUIREMENTS AND EVALUATION**

### **TECHNICAL BID SUBMISSION REQUIREMENTS AND EVALUATION**

#### **1. RATED REQUIREMENTS (TECHNICAL SUBMISSION)**

In the Technical Submission, the Bidder should demonstrate their understanding of the requirements contained herein and explain how they meet these requirements. Bidders should demonstrate their capability in a thorough, clear and concise manner for carrying out the work.

The Technical Submission should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that the Bidders address and present topics in the order of evaluation criteria under the same headings. To avoid duplication, bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

##### **1.1.1 EXPERIENCE OF THE BIDDER (CONSTRUCTION MANAGEMENT);**

Provide two (2) representative reference projects successfully completed by the Bidder and/or joint venture partner within the last ten (10) years relevant to the scope of services required, and the scale and scope of the Project described in this RFP. A similar project is defined as construction of a new Building or renovation of Classroom, Apartment and Office building 3000 square meters or greater, where the value of construction was no less than \$5,000,000.00 and the project was delivered through Construction Management. Acceptable similar are food, training centre, university, firing ranges or similar government facilities. Only the first two (2) projects listed in sequence will receive consideration and any others will receive none as though not included. The following information is to be included for each representative project:

#### **1. Project Relevance:**

A brief project description and intention of the project including:

1. Total Construction Value and contracts managed
2. Start and Completion Dates
3. Names of key personnel responsible for the project delivery

Clearly indicate how and why each referenced project is comparable to the subject project of this RFP against the following criteria:

4. Nature of Work
  5. Resource Management
  6. Complexity, Constraints, and Expectations
  7. Public and Other Stakeholder Involvement
2. Project Management:
  1. Budget control and management (i.e. initial contract price & final construction cost with explanation to address variances)
  2. Schedule control and management (i.e. initial schedule and revised schedule with explanation to address variances)
  3. Scope, quality and risk management to achieve client's expectations

### 3

1. Project Reporting: Project reporting requirements.

- 4 Project reporting requirements Provide contact information for client references knowledgeable in the representative project and the Bidder's role. The references will only be contacted by the Contracting Authority to confirm submitted material.

Only projects performed by the Bid Firm will be considered unless these entities form part of a joint venture Proponent.

## 1.1.2 EXPERIENCE OF KEY PERSONNEL OF THE BIDDER

### 1. TEAM IDENTIFICATION.ANDQUALIFICATIONS

The Construction Management Team to be identified shall include, as a minimum, the following key staffing positions. Please provide resumes for the following key personnel which demonstrate the following requirements:

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### 1. Construction Manager

Demonstrate the Construction Manager has a minimum of fifteen (15) years progressive experience in the construction industry, having worked the last five (5) years in management positions as a Construction Manager of projects similar in size, complexity and scope at a minimum construction value of \$5,000,000.00. Provide academic qualifications and certifications including professional designations and degrees such as P. Eng., Architect, Gold Seal, Occupational Health and Safety Certifications, etc.

### 2. Project Manager

Demonstrate the Project Manager has a minimum of fifteen (15) years progressive experience in the construction industry, having managed projects of similar size, complexity and scope within the last five (5) years at a minimum construction value of \$5,000,000.00. Provide academic qualifications and certifications including professional designations and degrees such as P. Eng., Architect, PMP, etc.

### 3. Cost Estimator

Demonstrate the Cost Estimator has a minimum of ten (10) years progressive experience in the construction industry, having produced estimates in the past three (3) years on projects of similar size, complexity and scope with a minimum construction value of \$5,000,000.00. Provide academic qualifications and certifications including professional designations and degrees such as P. Eng., Architect, Quantity Surveyor (PQS), Gold Seal, etc.

### 4. Scheduler

Demonstrate the Scheduler has a minimum of ten (10) years progressive experience in the construction industry, including the last three (3) years developing and managing schedules using scheduling software such as CMP, PERT, MS Project, etc., on projects of similar size, complexity and scope with a minimum construction value of \$5,000,000.00. Provide academic qualifications and certifications including professional designations and degrees such as P. Eng., Architect, PMP, etc.

### 5. Site Superintendent

Demonstrate the Site Superintendent has a minimum of fifteen (15) years progressive experience in the construction industry, including the last five (5) years as Site Superintendent on projects of similar size, complexity and scope with a minimum construction value of \$5,000,000.00. Provide

academic qualifications and certifications including professional designations and degrees such as P. Eng., Architect, Gold Seal, Occupational Health and Safety Certifications, etc.

#### 6. Site Safety Officer

Demonstrate the Site Safety Officer has a minimum of ten (10) years progressive experience in the construction industry, including the last three (3) years as a Site Safety Officer on projects of similar size, complexity and scope with a minimum construction value of \$5,000,000.00. Provide academic qualifications and certifications including professional designations and degrees such as Gold Seal, CIH, JHSC Certification, etc.

## 2. EXPERIENCE AND SUITABILITY OF PROPOSED STAFF

Describe the experience and performance of the key personnel to be assigned to this project regardless of their past association with the current Bidder. Information to be provided for each member of the key personnel identified above at 1.1.2.1. This is the opportunity to emphasize the strengths of the individuals on the team, to recognize their past responsibilities, commitments and achievements. Limit resumes to four (4) pages for the Construction Manager and Project Manager. Limit resumes to two (2) pages for other staff.

Experience in the proposed position and number of years of experience in both the proposed position and the construction industry (if not with Bidder firm, specify name of firm).

Role, responsibility and degree of involvement of individual in past projects (especially those identified as reference projects).

### 1.1.3 UNDERSTANDING THE PROJECT

The Bidder is to demonstrate a good understanding of the goals of the project, the functional/technical requirements, the constraints and issues that will shape the project, including as a minimum:

1. A description of the main project goals, including the Client User's functional and technical requirements
2. A description of the Construction Management philosophy and methodology to meet the intent of the project and PWGSC's expectations
3. A description of approach to deal with significant issues, risks, benefits, challenges and constraints during the project.
4. The interests of both internal and external stakeholders

## 5. The expectations of the Client

### 1.1.4 MANAGEMENT OF SERVICES

The Bidder is to describe how it proposes to effectively perform the services and deliver the work while meeting the project constraints and ensuring consistent control throughout the project. The Bidder should also demonstrate how the team will be organized and managed. Information to be provided as a minimum:

- 1 Provide your Team's organizational chart with all proposed personnel as required to deliver the project in the most cost and time efficient manner. The organizational chart shall identify and show:
  - 1 Proposed team member names and backup as well as their proposed positions for both pre-construction and construction stages of the work.
  - 2 Contractual and reporting relationships with PWGSC, the consultant, the Client, and major external stakeholders.
2. Provide a description of the Team organizational chart to describe:
  1. Reporting relationships within the firm, with PWGSC, NRC, the consultant and other stakeholders.
  2. Internal and external communication strategies, including meetings, communication tools, reporting tools and format.
  3. How advice will be provided during the design and tender and construction phases.
  4. Schedule, cost, scope, quality and risk management control and methodology to be applied throughout the delivery of the project.
  5. Tendering methodology.
  6. Commissioning methodology.
  7. Health and Safety philosophy, policy, process and procedural documentation and how it is aligned with the requirements of the project.

### 1.1.5 WORK PLAN AND METHODOLOGIES

1. The Bidder is to describe how they propose to undertake the assignment to achieve the project objectives through a high level work plan identifying major tasks and application of proven methodology. The Bidder is to provide the following as a minimum:
  - 1 Cost Management

### 3. Construction Manager's Costs

1. A description of procedures to be put in place to manage the cost of the services to be provided under this assignment.

#### 2. Project Costs

1. A description of cost control and methodology to be applied throughout the delivery of the project.

2. Describe the estimating process the Bidder will use to document the cost of each bid package, and explain how costs will be compared to market conditions.

### 4. Time Management (Schedule)

1. A description of the schedule control and methodology to be applied throughout the delivery of the project.

### 5. Quality Management

1. A description of the quality control and quality assurance methodology to be applied throughout the delivery of the project to ensure deliverables meet expectations.

### 6. Scope Management (Change Management)

1. A description of the scope change control methodology to be applied throughout the delivery of the project.

### 7. Risk Management

1. A description of how the Bidder will support and contribute to the design and construction phases with respect to risk management.

### 8. Communications Management

1. Provide a description of the internal and external communication strategies, including meetings, communication tools, reporting tools and format.

2. Describe the reporting relationships within the Bidders organization, PWGSC, and the Client.

### 9. Resource Management

#### 1. Project Team

1. Detail how the Bidder will maintain the key team personnel available to the project for the duration of the work.

#### 2. Site Health and Safety

1. Provide a description of the Health and Safety philosophy, policies, process and procedural documentation and how it is aligned with the requirements of the project.

2. Provide a narrative describing how the Bidder will

implement a Site Specific Health & Safety Plan for this project.

## 10. Procurement Management

### 1. Trade contracts (tendering strategy)

1. through a high level work plan identifying major tasks and application of proven methodology. The Bidder is to provide the following as a minimum:

## 11. Cost Management

### 1. Construction Manager's Costs

1. A description of procedures to be put in place to manage the cost of the services to be provided under this assignment.

### 2. Project Costs

1. A description of cost control and methodology to be applied throughout the delivery of the project.
2. Describe the estimating process the Bidder will use to document the cost of each bid package, and explain how costs will be compared to market conditions.

## 12. Time Management (Schedule)

1. A description of the schedule control and methodology to be applied throughout the delivery of the project.

## 13. Quality Management

1. A description of the quality control and quality assurance methodology to be applied throughout the delivery of the project to ensure deliverables meet expectations.

## 14. Scope Management (Change Management)

1. A description of the scope change control methodology to be applied throughout the delivery of the project.

## 15. Risk Management

1. A description of how the Bidder will support and contribute to the design and construction phases with respect to risk management.

## 16. Communications Management

1. Provide a description of the internal and external communication strategies, including meetings, communication tools, reporting tools and format.
2. Describe the reporting relationships within the Bidders organization, PWGSC, and the Client.

## 17. Resource Management

1. Project Team

1. Detail how the Bidder will maintain the key team personnel available to the project for the duration of the work.
2. Site Health and Safety
  1. Provide a description of the Health and Safety philosophy, policies, process and procedural documentation and how it is aligned with the requirements of the project.
  2. Provide a narrative describing how the Bidder will implement a Site Specific Health & Safety Plan for this project.

## 18. Procurement Management

### 1. Trade contracts (tendering strategy)

1. Provide a description of the proposed tendering methodology including a discussion as to how the Bidder would ensure cost effective contracts through competitive tendering.
2. Detail how the Bidder will ensure that qualified contractors will be available to tender and undertake the necessary work compliance with design requirements.

### 2. Long Delivery Items

1. Provide a description of the mechanism to identify and acquire any long term or limited delivery components necessary for the work.

1. In addition to the above the Bidder is to provide:
  1. A breakdown of work tasks and deliverables. Include a narrative describing the Work Plan. In the narrative, indicate how the Bidder would address any adjustments to the Work Plan for changes in site conditions or other project impacts.
  2. An initial construction schedule in 'bar chart' format with commentary based on the Terms of Reference, the information disclosed in the RFP and additional reasonable assumptions that anticipates the various issues that may be faced by the Bidder in undertaking the Work. The schedule shall outline activities, sequencing and interdependence of construction activities and work packages backed up with a narrative report describing:

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1. A description as to how the Bidder will coordinate with the design consultant and contribute to the process of aligning the design to meet both cost and schedule constraints.
2. A cost estimating strategy describing the process the Bidder will employ to determine construction costs at each stage of the work as the design progresses. Detail the estimating process the Bidder will use to document the cost of each bid package prior to tender, and explain how costs will be compared to market conditions.
3. A description as to how the Bidder will perform design and construction document reviews and communicate assumptions, risks and constructability review comments to the consultant team and PWGSC at both ongoing basis and at set review intervals.
4. A description of how advisory services will be provided during the design stages.
5. A description of the proposed commissioning methodology.

## 2. Evaluation of Rated Requirements

In the first instance, price envelopes will remain sealed and only the Rated Requirements (Technical Submission) of the proposals which are responsive will be reviewed, evaluated and rated by a PWGSC Evaluation Board in accordance with the following to establish Technical Ratings:

To be considered further, bidders must achieve a minimum technical rating of sixty percent (60%) of available points in each specific category and seventy five (75%) points out of the hundred (100) points available as a total technical score. No further consideration will be given to bidders not achieving this criterion.

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## Evaluation Table

SRE-ID	Description	Available Points	Weight	6. Minimum	Maximum Points
1.1.1	Experience of Bidders	0 to	2.0	12	20
1.1.2	Experience of Key Personnel	0 to	2.0	12	20
1.1.3	Understanding the Project	0 to	1.0	6	10
1.1.4	Management of Services	0 to	2.0	12	20
1.1.5	Work Plan and	0 to	3.0	18	30
	Total Technical Score			75	100

### 1. Generic Evaluation Table

WEAK				STRONG		
Did not submit information which could be evaluated	Lacks complete or almost complete understanding of the requirements.	Has some understanding of the requirements but lacks adequate understanding in some areas of the requirements.	Demonstrates a good understanding of the requirements	Demonstrates a very good understanding of the requirements	Demonstrates an excellent understanding of the requirements.	
	Weaknesses cannot be corrected	Generally doubtful that weaknesses can be corrected	Weaknesses can be corrected	No significant weaknesses	No apparent weaknesses	
	Proponent does not possess qualifications and experience	Proponent lacks qualifications and experience	Proponent has an acceptable level of qualifications and experience	Proponent is qualified and experienced	Proponent is highly qualified and experienced	
	Team proposed is not likely able to meet requirements	Team does not cover all components or overall experience is weak	Team covers most components and will likely meet requirements	Team covers all components - some members have worked successfully together	Strong team - has worked successfully together on comparable projects	
	Sample projects not related to this requirement	Sample projects generally not related to this requirement	Sample projects generally related to this requirement	Sample projects directly related to this requirement	Leads in sample projects directly related to this requirement	
	Extremely poor. Insufficient to meet performance	Little capability to meet performance	Acceptable capability, should ensure adequate	Satisfactory capability, should ensure effective results	Superior capability, should ensure very effective results	

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## PRICE BID EVALUATION

All price proposal envelopes corresponding to responsive technical proposals which have achieved a minimum 60% of available points in each category and 75% of total points will be opened upon completion of the technical evaluation.

1. To be declared responsive, a bid must:
  1. Comply with all the requirements of the bid solicitation; and
  2. Obtain the required minimum points for each of the technical bid evaluation criteria which are subject to point rating.
2. The price bid must consist of the duly completed Bid and Acceptance Form accompanied by the required bid security. Bids not meeting a) or b) above will be declared non-responsive.
3. Refer to Special Instructions: SI08, for a summary of the evaluation process

## TOTAL SCORE

Total Scores will be established in accordance with the following:

Rating	Possible Range	% of Total Score	Score Points
Technical Rating	0 - 100	70	0 - 70
Price Rating	0 - 100	30	0 - 30
Total Score		100	0 - 100

7. The Bidder receiving the highest Total Score is the first entity that the Evaluation Board will recommend for the provision of the required services. In the case of a tie, the Bidder submitting the lower price for the services will be selected.
8. Refer to Special Instructions: SI08, for a summary of the evaluation process.