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800 Burrard Street, Room 219  
800, rue Burrard, pièce 219  
Vancouver, BC V6Z 0B9  
Bid Fax: (604) 775-7526

## Revision to a Request for Supply Arrangement - Révision à une demande pour un arrangement en matière d'approvisionnement

The referenced document is hereby revised; unless  
otherwise indicated, all other terms and conditions of  
the Solicitation remain the same.

Ce document est par la présente révisé; sauf  
indication contraire, les modalités de l'invitation  
demeurent les mêmes.

### Comments - Commentaires

### Vendor/Firm Name and Address

Raison sociale et adresse du  
fournisseur/de l'entrepreneur

### Issuing Office - Bureau de distribution

Public Works and Government Services Canada -  
Pacific Region  
219 - 800 Burrard Street  
800, rue Burrard, pièce 219  
Vancouver, BC V6Z 0B9

|   |  |  |
|---|--|--|
| <b>Title - Sujet</b><br>P3 Advisory Services  |  |  |
| <b>Solicitation No. - N° de l'invitation</b><br>EZ156-170002/B  |  | <b>Date</b><br>2018-03-14  |
| <b>Client Reference No. - N° de référence du client</b><br>EZ156-170002   |  | <b>Amendment No. - N° modif.</b><br>002  |
| <b>File No. - N° de dossier</b><br>VAN-7-40361 (580)  | <b>CCC No./N° CCC - FMS No./N° VME</b> |  |
| <b>GETS Reference No. - N° de référence de SEAG</b><br>PW-\$VAN-580-8298  |  |  |
| <b>Date of Original Request for Supply Arrangement</b><br><b>Date de demande pour un arrangement en matière d'app. originale</b>  |  | 2018-02-07   |
| <b>Solicitation Closes - L'invitation prend fin</b><br><b>at - à 02:00 PM</b><br><b>on - le 2018-03-28</b>  |  | <b>Time Zone</b><br><b>Fuseau horaire</b><br>Pacific Daylight<br>Saving Time PDT |
| <b>Address Enquiries to: - Adresser toutes questions à:</b><br>Navarro-Ocampo, Maria  |  | <b>Buyer Id - Id de l'acheteur</b><br>van580                                     |
| <b>Telephone No. - N° de téléphone</b><br>(604) 318-3684 ( )  | <b>FAX No. - N° de FAX</b><br>( ) -    |  |
| <b>Delivery Required - Livraison exigée</b>   |  |  |
| <b>Destination - of Goods, Services, and Construction:</b><br><b>Destination - des biens, services et construction:</b>   |  |  |
| <b>Security - Sécurité</b><br>This revision does change the security requirements of the solicitation.<br>Cette révision change les besoins en matière de sécurité de l'invitation. |  |  |

Instructions: See Herein

Instructions: Voir aux présentes

|  |  |   |
|--|--|---|
| <b>Acknowledgement copy required</b><br><b>Accusé de réception requis</b>  | <b>Yes - Oui</b><br><input type="checkbox"/> | <b>No - Non</b><br><input type="checkbox"/> |
| <b>The Offeror hereby acknowledges this revision to its Offer.</b><br><b>Le proposant constate, par la présente, cette révision à son offre.</b>   |  |   |
| <b>Signature</b>   | <b>Date</b>                                  |   |
| Name and title of person authorized to sign on behalf of offeror. (type or print)<br>Nom et titre de la personne autorisée à signer au nom du proposant.<br>(taper ou écrire en caractères d'imprimerie) |  |   |
| <b>For the Minister - Pour le Ministre</b>   |  |   |

## Amendment 002

This Amendment 002 is being raised to answer questions raised and revise the Solicitation.

**A note to Bidders:** *The Request for Standing Offer (RFSO) and the Request for Supply Arrangement (RFSa) will be used to satisfy the same requirement for P3 Advisory Services but are two distinct methods of supply. Each resulting Standing Offer and Supply Arrangement has specific terms and conditions that must be accepted and acknowledged by the Bidder, which is why Bidders are required to submit a separate response for the RFSO and for the RFSa. In terms of the evaluation, the RFSO and the RFSa contain the same Technical Requirements, however, the RFSO contains a Financial component, whereas the RFSa does not.*

### I. QUESTIONS & ANSWERS

***In Amendment 001, one of the responses provided did not accurately address the question posed. We therefore ask the Bidders to disregard the answer provided for Question 3 of Amendment 001 and refer to following instead.***

**Q1:** With respect to the requirement to have resources available in major business centres (Vancouver, Ottawa, Toronto, Montreal), is a willingness to travel sufficient or must the successful proponent have offices in those cities?

**A1:** As this is a National Master Standing Offer, proposed resources should be located in the cities indicated, however it is not mandatory for Bidders to have offices in these cities. Contractor travel may be necessary and will require prior approval by the RFSO and RFSa Project Authority and be subject to the TBS Directive on Travel, Hospitality, Conference and Event Expenditures.

### II. REVISIONS

1. On Page 8 of 51, **DELETE:** Bidders will be required to provide not only resumes which support and substantiate the requirements of proposed resources, but will also be required to provide detailed descriptions of past project experience.

**INSERT:** Bidders will be required to substantiate the requirements of proposed resources, and will also be required to provide detailed descriptions of past project experience.

2. On Page 22 of 51, Annex A, of the RFSa, A.4 Principal/Team Lead, **DELETE: Experience:** This resource must be able to draw on their experience leading large complex P3, alternative delivery method, and / or comparable projects with capital costs in excess of \$100M, with a minimum of ten years of relevant related work experience in the last 15 years, including a minimum of four years of demonstrated experience in areas outlined in this Statement of Work and must have led a minimum of four of the five Work Activities of P3 and/or alternative delivery method project development described in Article A.3, Anticipated Work. The resource must have led activities described in A.3.4. Procurement (Planning to Financial Close).

**INSERT: Experience:** This resource must be able to draw on their experience leading large complex P3, alternative delivery method, and / or comparable projects with capital costs in excess of \$100M, with a minimum of ten years of relevant related work experience in the last 15 years, including a minimum of **six years** of demonstrated experience in areas outlined in this Statement of Work and must have led a minimum of four of the five Work Activities (**A.3.1 to A.3.5**) of P3 and/or alternative delivery method project development described in Article A.3, Anticipated Work. The resource must have led activities described in A.3.4. Procurement (Planning to Financial Close).

3. On Page 31 of 51, **DELETE** the following: **F.2.3 Single Rate Per Resource Category in Financial Bid.**
4. On Page 31 of 51, **DELETE** the following: Arrangements will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria. An evaluation team composed of representatives of Canada will evaluate the responses.  
**INSERT** the following: Arrangements will be assessed in accordance with the entire requirement of the bid solicitation. An evaluation team composed of representatives of Canada will evaluate the responses.
5. On Page 33 of 51 of Annex F, **DELETE** the following:  
**F.2.3: Single Rate Per Resource Category in Financial Bid**  
A single rate must be identified in the Financial Bid (Annex B – Basis of Payment) for each Resource Category.
6. On Page 34 of 51 of Annex F, F.2.2 of the RFSA, Proposed Resources by Resource Categories, Principal/Team Lead, **DELETE: Experience:** This resource must be able to draw on their experience leading large complex P3, alternative delivery method, and / or comparable projects with capital costs in excess of \$100M, with a minimum of ten years of relevant related work experience in the last 15 years, including a minimum of four years of demonstrated experience in areas outlined in this Statement of Work and must have led a minimum of four of the five Work Activities of P3 and/or alternative delivery method project development described in Article A.3, Anticipated Work. The resource must have led activities described in A.3.4. Procurement (Planning to Financial Close).  
**INSERT: Experience:** This resource must be able to draw on their experience leading large complex P3, alternative delivery method, and / or comparable projects with capital costs in excess of \$100M, with a minimum of ten years of relevant related work experience in the last 15 years, including a minimum of **six years** of demonstrated experience in areas outlined in this Statement of Work and must have led a minimum of four of the five Work Activities (**A.3.1 to A.3.5**) of P3 and/or alternative delivery method project development described in Article A.3, Anticipated Work. The resource must have led activities described in A.3.4. Procurement (Planning to Financial Close).
7. On Page 38 of 51 of Annex F, F.3.1.B of the RFSA, Relevant Corporate Experience, **DELETE:** The Bidder should provide a brief description of four projects, each with present value costs greater than one hundred million dollars, undertaken within the last 15 years by the Bidder, as proof of its ability to deliver advisory services, including but not limited to activities identified in Article A.3 of Annex A, for P3 and/or alternate delivery method projects; from conceptualization and pre-planning to implementation and operations. At least two of the described projects should be P3s.  
**INSERT:** The Bidder should provide a brief description of four projects, each with present value costs greater than one hundred million dollars, undertaken within the last **10 years** by the Bidder, as proof of its ability to deliver advisory services, including but not limited to activities identified in Article A.3 of Annex A, for P3 and/or alternate delivery method projects; from conceptualization and pre-planning to implementation and operations. At least **three** of the described projects should be P3s.
8. On Page 41 to 43 of 51 of Annex F: Points Summary Table for F.3.3 of the RFSA, **DELETE** in its entirety. **INSERT** the following:

**Points Summary Table for F.3.3**

**[REV 001 – March 15, 2018]**

| Section<br>F.3.3 | Maximum Overall Score for Section F.3.3   | 100                            |
|------------------|---|--------------------------------|
| Section          | Criteria  | Criterion<br>Maximum<br>Points |
| <b>F.3.3.A</b>   | <p><b>Suitable Team</b><br/>The Bidder should propose a suitable team that will be composed of Principals, Managers, and Analysts capable of performing the various Work Activities outlined in Article A.3 of Annex A, Statement of Work, for the business volume forecasted in Article F.5.6 over the term of this contract.</p> <p>A "suitable team" should include at the minimum:</p> <ol style="list-style-type: none"> <li>1) Adequate coverage* of resources for each Anticipated Work Activity; and</li> <li>2) Indication that resources are located in major business centres across Canada (Vancouver, Ottawa, Toronto, Montreal).</li> </ol> <p>*Adequate coverage for each Anticipated Work Activity (A.3.1 to A.3.5 identified in Article A.3, Annex A, Statement of Work) is defined as follows.</p> <p>Each Work Activity (A.3.1 to A.3.5) should have at least 2 Principal/Team Leads, 2 Manager/Lead Advisors, and 2 Analysts with relevant experience in the specified Work Activity to be considered adequate.</p> <p>Scoring Methodology: Criteria will be scored between 0 and 5 using Scale 2: Approach and Methodology, as described in F.3. This rating will be converted into a weighted score using the formula identified in F.3.</p> <ul style="list-style-type: none"> <li>• Criteria will be scored between 0 and 5 for a Criterion Awarded Rating</li> <li>• Maximum Scale Rating = 5</li> <li>• Maximum Points for the Evaluation Criterion = 10</li> </ul> | <b>10</b>                      |
| <b>F.3.3.B</b>   | <p><b>Qualified Resources</b><br/>The Bidder should provide a clear description of the proposed resources' educational background, accreditation, relevant work experience, knowledge and demonstrated ability to complete assignments on P3, alternate delivery method and/or comparable projects having present value costs greater than one hundred million dollars. The Bidder should demonstrate that each proposed resource meets all the requirements described in the applicable Resource Category specified in Article A.4 of Annex A, Statement of Work.</p> <p>&gt;&gt;&gt;In addition to completing the mandatory information required in F.3.1, the Bidder must present a Resource Profile of no more than five pages for each of the proposed resources and should use the appropriate profile template in <b>Response Table 4: Resource Profile</b>. If the template is not used, the evaluators may not find the required information and may be unable to appropriately score the resource's qualification and contribution. Each Resource Profile for Principal/Team Lead and for Manager/Lead Advisor is to include a description of four projects that the resource is working on or has worked on within the last ten years. Each Resource Profile for Analyst is to include a description of two projects that the resource is working on or has worked on within the last ten years.</p>   | <b>90</b>                      |

The Resource Profile must provide evidence to clearly describe and substantiate the individual resource's roles and responsibilities on a project, not just what the firm delivered on a project.

Canada reserves the right to validate any education, accreditation or work history documentation before the award of any contract, including requesting hard copy education and accreditation certifications.

*Scoring Methodologies:*

**Principal/Team Lead Category:**

A maximum of five resources should be submitted for this category. If more than five resources are submitted, the evaluation committee will score the first five resources presented in the bid.

Five resources in this category are necessary to potentially achieve the Maximum Scale Rating of 100.

Each resource must provide four projects. Each project will be scored between 0 and 5 using Scale 3: Proposed Resources, as described in F.3. This rating will be converted into a weighted score using the formula identified in F.3.

- The score for each of the four projects will be added together for a total score for each resource out of 20. The total scores for each resource will be added together for a Criterion Awarded Rating
- Maximum Scale Rating = 100
- Maximum Points for the Evaluation Criterion = 30

For reference, a sample scoring matrix is provided below. Sample scores for each resource are provided for illustrative purposes only.

| <b>Principal</b>                | <b>Total Score per Resource<br/>(4 projects with max 5 points each)</b> |
|---------------------------------|---|
| Resource 1                      | 20  |
| Resource 2                      | 17  |
| Resource 3                      | 16  |
| Resource 4                      | 18  |
| Resource 5                      | 19  |
| <b>Criterion Awarded Rating</b> | (Sum of all Total Scores) <b>90</b>                                     |
| <b>Maximum Scale Rating</b>     | <b>100</b>  |
| <b>Weighted Score (max 30)</b>  | <b>27</b>   |

**Manager/Lead Advisor Category:**

A maximum of seven resources should be submitted for this category. If more than seven resources are submitted, the evaluation committee will score the first seven resources presented in the bid.

Seven resources in this category are necessary to potentially achieve the Maximum Scale Rating of 140.

Each resource must provide four projects. Each project will be scored between 0 and 5 using Scale 3: Proposed Resources, as described in F.3. This rating will be converted into a weighted score using the formula identified in F.3.

- The score for each of the four projects will be added together for a total score for each resource out of 20. The total scores for each resource will be added together for a Criterion Awarded Rating
- Maximum Scale Rating = 140
- Maximum Points for the Evaluation Criterion = 40

For reference, a sample scoring matrix is provided below. Sample scores for each resource are provided for illustrative purposes only.

| <b>Manager</b>                  | <b>Total Score per Resource<br/>(4 projects with max 5 points each)</b> |
|---------------------------------|---|
| Resource 1                      | 17  |
| Resource 2                      | 18  |
| Resource 3                      | 20  |
| Resource 4                      | 19  |
| Resource 5                      | 16  |
| Resource 6                      | 18  |
| Resource 7                      | 19  |
| <b>Criterion Awarded Rating</b> | <b>(Sum of all Total Scores) 127</b>                                    |
| <b>Maximum Scale Rating</b>     | <b>140</b>  |
| <b>Weighted Score (max 40)</b>  | <b>36</b>   |

#### **Analyst Category:**

A maximum of seven resources should be submitted for this category. If more than seven resources are submitted, the evaluation committee will score the first seven resources presented in the bid.

Seven resources in this category are necessary to potentially achieve the Maximum Scale Rating of 70.

Each resource must provide two projects. Each project will be scored between 0 and 5 using Scale 3: Proposed Resources, as described in F.3. This rating will be converted into a weighted score using the formula identified in F.3.

- The score for each of the two projects will be added together for a total score for each resource out of 10. The total scores for each resource will be added together for a Criterion Awarded Rating
- Maximum Scale Rating = 70
- Maximum Points for the Evaluation Criterion = 20

For reference, a sample scoring matrix is provided below. Sample scores for each resource are provided for illustrative purposes only.

| Analyst   | Total Score per Resource<br>(2 projects with max 5 points each) |
|---|---|
| Resource 1  | 9   |
| Resource 2  | 10  |
| Resource 3  | 8   |
| Resource 4  | 7   |
| Resource 5  | 9   |
| Resource 6  | 10  |
| Resource 7  | 6   |
| <b>Criterion Awarded Rating</b>   | (Sum of all Total Scores) <b>59</b>                             |
| <b>Maximum Scale Rating</b>   | <b>70</b>   |
| <b>Weighted Score (max 20)</b>  | <b>17</b>   |
| NOTE 1: If the Resource Profile is longer than five pages, the additional pages will not be reviewed, and points will not be awarded for material that is deemed to be in excess of that requested. |   |

9. On Page 44 of 51, Annex F, F.3.4 of the RFSA, **DELETE** Point Rated Tabulation in its entirety. **INSERT** the following:

**F.3.4 Technical Arrangement - Point Rated Tabulation** [REV 001 – March 15, 2018]

| Description   | Scale Used     | Maximum Scale Rating | Maximum Points |
|---|----------------|----------------------|----------------|
| <b>Management Response</b> – Corporate Profile  | <b>Scale 1</b> | <b>N/A</b>           | <b>5</b>       |
| <b>Management Response</b> – Relevant Corporate Experience  | <b>Scale 1</b> | <b>20</b>            | <b>45</b>      |
| <b>Technical Arrangement</b> – Understanding of SA Requirements                                   | <b>Scale 2</b> | <b>N/A</b>           | <b>5</b>       |
| <b>Technical Arrangement</b> – Management Structure, Quality Control and Risk Management Approach | <b>Scale 2</b> | <b>N/A</b>           | <b>5</b>       |
| <b>Technical Arrangement</b> – Delivery Management Approach                                       | <b>Scale 2</b> | <b>5</b>             | <b>10</b>      |
| <b>Technical Arrangement</b> – Suitable Team  | <b>Scale 2</b> | <b>5</b>             | <b>10</b>      |
| <b>Technical Arrangement</b> – Qualified Resources: Principal/Team Lead Category                  | <b>Scale 3</b> | <b>100</b>           | <b>30</b>      |
| <b>Technical Arrangement</b> – Qualified Resources: Manager/Lead Advisor                          | <b>Scale 3</b> | <b>140</b>           | <b>40</b>      |
| <b>Technical Arrangement</b> – Qualified Resources: Analyst                                       | <b>Scale 3</b> | <b>70</b>            | <b>20</b>      |
| <b>TOTAL</b>  |                |                      | <b>170</b>     |

10. On Pages 46 of 51, Response Table 2, **DELETE**: This is in addition to providing the appropriate Resource Profile and background information including a resume for each individual. Resumes will be used to substantiate the proposed resources' education and experience, as per Section F.3.3.

**INSERT**: This is in addition to providing the appropriate Resource Profile and background information for each individual.

11. On Pages 49 and 50 of 51, Annex F, F.5 of the RFSA, Response Table 4: Resource Profile for the Principal/Team Lead and Manager/Lead Advisor, **INSERT** the following section G - Work History:

| G. |     | <b>Work History</b>   |
|----|-----|---|
|    | G.1 | <b>Work History</b> – Provide a work history for the past fifteen years including position title; employer; start date (mm-yy) and end date (mm-yy) with each employer; and a brief description of responsibilities in each position. |

12. On Page 51 of 51, Annex F, F.5 of the RFSA, Response Table 4: Resource Profile for the Analyst, **INSERT** the following section G - Work History:

| G. |     | <b>Work History</b>   |
|----|-----|---|
|    | G.1 | <b>Work History</b> – Provide a work history for the past ten years including position title; employer; start date (mm-yy) and end date (mm-yy) with each employer; and a brief description of responsibilities in each position. |

***All other terms and conditions remain unchanged.***