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## Revision to a Request for a Standing Offer

## Révision à une demande d'offre à commandes

National Master Standing Offer (NMSO)

Offre à commandes principale et nationale (OCPN)

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

Ce document est par la présente révisé; sauf  
indication contraire, les modalités de l'offre 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> P3 Advisory Services		
<b>Solicitation No. - N° de l'invitation</b> EZ156-170002/A		<b>Date</b> 2018-03-14
<b>Client Reference No. - N° de référence du client</b> EZ156-170002		<b>Amendment No. - N° modif.</b> 002
<b>File No. - N° de dossier</b> VAN-7-40361 (580)	<b>CCC No./N° CCC - FMS No./N° VME</b>	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$VAN-580-8297		
<b>Date of Original Request for Standing Offer</b> Date de la demande de l'offre à commandes originale		2018-02-07
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2018-03-28</b>		<b>Time Zone</b> <b>Fuseau horaire</b> Pacific Daylight Saving Time PDT
<b>Address Enquiries to: - Adresser toutes questions à:</b> Navarro-Ocampo, Maria		<b>Buyer Id - Id de l'acheteur</b> van580
<b>Telephone No. - N° de téléphone</b> (604) 318-3684 ( )	<b>FAX No. - N° de FAX</b> ( ) -	
<b>Delivery Required - Livraison exigée</b>		
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b>		
<b>Security - Sécurité</b> This revision does change the security requirements of the Offer. Cette révision change les besoins en matière de sécurité de la présente offre.		

Instructions: See Herein

Instructions: Voir aux présentes

<b>Acknowledgement copy required</b> <b>Accusé de réception requis</b>	<b>Yes - Oui</b> <input type="checkbox"/>	<b>No - Non</b> <input type="checkbox"/>
<b>The Offeror hereby acknowledges this revision to its Offer.</b> <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) Nom et titre de la personne autorisée à signer au nom du proposant. (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 from Bidders and to 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

**Q1:** Can PWGSC elaborate on how the scoring works where we have put forward multiple individuals. For example if we put forward 3 resources in the Principal/Team Lead category there will be 4 projects per person which is a total of 12 projects rather than 4 projects. How would the scoring work in the above example?

**A1:** Please refer to the Revisions section, item 4, to see the changes made to G.3.3 of Annex G.

**Q2:** The Points Summary Table for G3.3 defines "suitable team" and "adequate resources". "3 Principals/Team Leads is considered adequate".

Does this mean that no more than 3 Principals should be put forward?

**A2:** Bidders may submit a maximum of: Five Principals/Team Lead, Seven Managers/Lead Advisors and Seven Analysts. Please refer to the Revisions section, item 4, to see the changes made to G.3.3 of Annex G.

**Q3:** If more than 3 Principals are permitted to be put forward can PWGSC confirm how the scoring works for both the experience and the projects? "4-7 Managers/Lead Advisors is considered adequate"

**A3:** Bidders may submit a maximum of: Five Principals/Team Lead, Seven Managers/Lead Advisors and Seven Analysts. Please refer to the Revisions section, item 4, to see the changes made to G.3.3 of Annex G.

**Q4:** Can PWGSC elaborate on how the scoring works where there the number of adequate resources is defined as a range. If we submit 7 resource profiles can we potentially score more points?

**A4:** Bidders may submit maximum of: Five Principals/Team Lead, Seven Managers/Lead Advisors and Seven Analysts. Please refer to the Revisions section, item 4, to see the changes made to G.3.3 of Annex G.

**Q5:** Rated requirement G3.1B, requests that the bidder provide four projects completed in the last 15 years. As the P3 market as evolved greatly over the past decade, projects dating as far back as 15 years may not be commercially relevant and firms that have completed these projects will usually no longer have the same resources who worked on those projects available today. To reflect the changing environment of P3 transactions as well as current market conditions and best practices, we believe that PSPC would benefit with more recent and relevant project experience. This would help PSPC better assess a Bidder's current capacity to deliver such projects. As such, would PSPC consider changing the requirement to four P3 projects that have reached financial close within the last 5 years?

**A5:** The requirement has been changed; Bidders should provide four projects undertaken within the last ten years. Please refer to the Revisions section, item 3, to see the changes made to G.3.1.B of Annex G.

**Q6:** G3.1B also requests that only two of the requested four projects to be submitted by the Bidder must be P3 projects. Since the scope of work pertains exclusively to P3 projects and because there is ample market capacity, would PSPC consider amending the requirement so that all four projects be completed as P3 projects?

**A6:** As per the RFSO Annex A, Statement of Work, the scope of work pertains to projects delivered via P3s and alternative delivery methods. The requirement has been changed, at least 3 of the projects should be P3s. Please refer to the Revisions section, item 3, to see the changes made to G.3.1.B of Annex G.

**Q7:** With regard to rated requirement G.3.3A, PSPC proposes a team of 3 Principals, 4-7 Managers and 3-4 Analysts. Will a team comprised of the maximum number of individuals score higher (i.e. would 7 managers score higher than 4)? Can we put more resources than the suggested number and would this result in more points?

**A7:** Bidders may submit a maximum of: Five Principals/Team Lead, Seven Managers/Lead Advisors and Seven Analysts. Please refer to the Revisions section, item 4, to see the changes made to G.3.3 of Annex G.

**Q8:** As per G.2.2, would PSPC change the minimum number of years of experience to 10 years for Principals to better align with the responsibilities described in the RFSO?

**A8:** The requirement has been changed, Principals must have a minimum of six years of demonstrated experience in areas outlined in the SOW. Please refer to the Revisions section, items 1 and 2, to see the changes made to A.4 of Annex A and G.2.2 of Annex G.

**Q9:** Under section G.2.2., a Principal/Team lead must have led 4 of the 5 activities detailed in A.4.3. When reading A.4.3., there appears to be 6 activities. As such, should a Principal have led 5 of 6 activities?

**A9:** The five Work Activities referenced here refer to A.3.1 to A.3.5. Please refer to the Revisions section, items 1 and 2, to see the changes made to A.4 of Annex A and G.2.2 of Annex G.

**Q10:** Under G.2.2, education requirements for all resources are stated as post-secondary education. To be consistent with the types of education sought, should "post-secondary education" be replaced by a "university degree"?

**A10:** The criterion will remain as stated in the original solicitation.

**Q11:** Under section G.3.1.B, how will projects be scored? For example, will a project demonstrating 5 work activities be scored higher than a project with a very large value with only 2 work activities?

**A11:** Projects will be scored based on the firm's demonstrated experience, its ability to deliver the required Work Activities and its relevancy to the SOW. The Work Activities should showcase the firm's roles and responsibilities and the results achieved. In the example provided, a project which demonstrates 5 work activities could very well score higher than a project with two work activities and a larger value, however, it is all dependent on the quality of the demonstrated experience provided across the Work Activities. Please refer to the Revisions section, item 3, for changes made to G.3.1.B.

**Q12:** Under section G.3.1B, the RFSO encourages bidders to submit projects that have a high value. Will such projects receive higher marks? If so, what does PSPC consider a project with a high value?

**A12:** There is no departmental definition for a high present value cost project, but for evaluation purposes of this solicitation, projects with capital costs greater than or equal to \$250million would be considered to

have a high present value cost. The capital cost is one of many criteria considered within the evaluation scale rating; a high present value cost may contribute to a higher score for a project, when considered with the other criteria.

**Q13:** As per G.3.1.B, since bidders cannot control the content of the references provided we believe that scoring the references is not acceptable and ask that this criterion be marked as a pass or fail instead of scored out of 5.

**A13:** The criterion will remain as stated in the original solicitation.

**Q14:** Under section G.3.3A, PSPC states that a suitable team should include at a minimum 3 principals, 4-7 managers and 3-4 analysts. Will a larger team score more points? Will a team double this size score twice as a high as a team meeting the minimum requirements?

**A14:** Bidders may submit maximum of: Five Principals/Team Lead, Seven Managers/Lead Advisors and Seven Analysts. Please refer to the Revisions section, item 4, to see the changes made to G.3.3 of Annex G.

**Q15:** Would PSPC consider adding a section on previous work history as part of Resource Table 4 (and adding one page to the maximum limit of pages for this section) and eliminating the need to submit CVs?

**A15:** Yes, the requirement to submit resumes has been removed and section G has been added to the Resource Profile which will allow resources to fully substantiate that they meet the required number of years of experience. Please refer to the Revisions section, item 6, to see the changes made to the Response Table 4: Resource Profile.

***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.***

**Q16:** 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?

**A16:** 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

***Bidders are asked to disregard Revision 4 of Amendment 001 as it was only meant for the RFSA Amendment 001.***

1. On Page 7 of 63, **DELETE:** Offerors 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:** Offerors 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 30 of 63, Annex A, of the RFSO, 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 43 of 63, Annex G, G.2.2 of the RFSO, 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).

4. On Page 47 of 63, Annex G, G.3.1.B of the RFSO, 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.

5. On Pages 50 to 52 of 63, Annex G, Points Summary Table for G.3.3 of the RFSO, **DELETE** in its entirety. **INSERT** the following:

**Points Summary Table for G.3.3**

**[REV 001 – March 15, 2018]**

Section G.3.3	Maximum Overall Score for Section G.3.3	100
Section	Criteria	Criterion

		<b>Maximum Points</b>
<b>G.3.3.A</b>	<p><b>Suitable Team</b></p> <p>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 G.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 G.3. This rating will be converted into a weighted score using the formula identified in G.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>G.3.3.B</b>	<p><b>Qualified Resources</b></p> <p>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 G.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 G.3. This rating will be converted into a weighted score using the formula identified in G.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 (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>	<b>(Sum of all Total Scores) 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 G.3. This rating will be converted into a weighted score using the formula identified in G.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 (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 G.3. This rating will be converted into a weighted score using the formula identified in G.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.

<b>Analyst</b>	<b>Total Score per Resource (2 projects with max 5 points each)</b>
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	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>	
<p>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.</p>			

6. On Page 52 of 63, Annex G, G.3.4 of the RFSO, **DELETE** Point Rated Tabulation in its entirety. **INSERT** the following:

**G.3.4 Technical Bid - Point Rated Tabulation [REV 001 March 15, 2018]**

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

7. On Page 58 of 63, 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 G.3.3.

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

8. On Pages 61 and 62 of 63, Annex G, G.6 of the RFSO, 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.

9. On Page 63 of 63, Annex G, G.6 of the RFSO, 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.***