



## Appendix "B"

### SPECIAL INSTRUCTIONS TO BIDDERS EVALUATION PROCEDURES & CRITERIA\_ **V2**



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### TECHNICAL PROPOSAL

It is essential that the elements contained in the Proposal be stated in a clear manner and in sufficient depth to allow for evaluation by the evaluation team.

#### 1.0 METHOD OF SELECTION – HIGHEST COMBINED SCORE OF TECHNICAL MERIT (ASSUMING PASS MARK OF 70% HAS BEEN MET) AND PRICE.

- 1.1 The evaluation process is designed to identify the most qualified contractor to provide services as stipulated in the Statement of Work (Appendix E).
- 1.2 This section comprises the detailed Proposal requirements that will be used to evaluate Bidders' responses to the RFP.
- 1.3 The selection of the responsive Proposal will be made on the basis of the **HIGHEST COMBINED SCORE** for both the technical and financial proposals. The combined scores will be determined by adding the technical and financial points obtained.

The Bidders' Technical and Financial proposals will be scored separately. An Overall Proposal Score will be determined by combining a Bidder's Technical Proposal Score and Financial Proposal Score in accordance with the following weights:

Technical Proposal = 40%  
Financial Proposal = 60%  
Overall Proposal = 100%

**Formula:** 
$$\frac{\text{Technical Score} \times \text{Ratio (40)}}{\text{Max Points}} + \frac{\text{Lowest Price} \times \text{Ratio (60)}}{\text{Bidder's Price}} = \text{Overall Score}$$

#### 1.4 To be considered responsive, a proposal MUST:

- 1- Include all the technical information specified in section 2.0;
- 2- Achieve a minimum score of 70% in each technical point rated requirement as set out in section 2.0.

- 1.5 The price of the Proposal will be evaluated in CANADIAN DOLLARS, Applicable Taxes excluded, FOB destination for goods/services, Customs Duties and Excise Taxes included.
- 1.6 The Bidders acknowledge and agree that Canada is not responsible to search for, and therefore evaluate, information that is not properly referenced.
- 1.7 Bidders shall not place any conditions or make any assumptions that attempt to limit or otherwise modify the scope of Work pursuant to the Statement of Work (Appendix E).
- 1.8 The Bidders will be ranked according to the combined financial and technical score. The Bidder with the highest combined score will be awarded the contract.
- 1.9 In the event two or more responsive proposals receive the same combined score, the proposal with the **highest technical score** will be ranked higher.



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### 2.0 POINT RATED REQUIREMENTS

2.1 **Points will be awarded based on the degree to which the information/material demonstrates the Bidder's capability to perform and successfully carry-out the requirement** described in this Request for Proposals.

2.2 It is suggested that these criteria be addressed in sufficient depth in the proposal. Items not addressed will be given a score of zero. Proposals will be evaluated solely on their content. Information referred to, but not provided as a paper copy (such as information on an Internet website) will not be evaluated as it could be changed after the closing date.

Failure of a Proposal to provide information in sufficient detail and depth to permit evaluation against the identified criteria may render a Proposal non-responsive. **All Bidders are advised that only listing experience without providing any supporting data to describe where and how such experience was obtained will not be considered to be “demonstrated” for the purpose of the evaluation. All professional experience must be fully demonstrated in the Proposal (i.e., dates, number of years and months of experience).**

2.3 A minimum score of 70% per criteria must be obtained for a tender to be considered responsive. Failure to obtain this minimum score will have the tender discarded.

Technical Requirements	MAX. SCORE	MIN. SCORE
<b>1. Personnel and References (3 pages maximum)</b> Provide the resumes of the primary individuals responsible for the provision of the services and deliverables indicated herein.	10	7
<ul style="list-style-type: none"> <li>- Personnel identified, including qualifications, professional designations</li> <li>- Relevant experience with similar projects. Number and adequacy of resources applied to the project, including back-up resources and the use of sub-contractors.</li> <li>- Level of involvement of resources identified</li> <li>- Responsibility and function of the project team (including sub-contractors)</li> <li>- Three References (name and contact information)</li> </ul> <p>It is required that the persons identified in the resumes will be the main project leads and contacts throughout the duration of the project, having direct involvement in all phases of the project.</p>		
<b>2. Technical Abilities (2 pages maximum)</b> Demonstrate experience in the supply, installation and on-going support of electric vehicle charging stations.:	10	7
<p>Provide a description of three (3) Electric Vehicle Supply Equipment (EVSE) projects that have been successfully completed within past five (5) years where the Contractor was directly involved as the lead designer and construction contractor.</p> <p>For each project cited, at a minimum include the following details:</p> <ul style="list-style-type: none"> <li>- Project type and scope of retrofit (describe work involved, to what extent)</li> <li>- Quantity of EVSE's</li> <li>- Implementation timeframe</li> <li>- Particular challenges or unique features of project.</li> <li>- Indicators of success and how they were assessed</li> <li>- How issues were addressed.</li> <li>- Names of the Contractor's personnel involved and what their roles were.</li> <li>- Identify the name of the client and contact information for the purposes of reference checking</li> </ul>		



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<b>3. Energy Monitoring System</b>	25	17.5
<ul style="list-style-type: none"> <li>- Explain how the web-based system will permit AAFC to collect data from all seven locations and analyze the data in a single monitoring program.</li> <li>- Assurance that the monitoring program is “off the shelf” and ready for immediate application.</li> <li>- System must capture time of day, duration, voltage, current, charger energy (kWh), identification of the user (as identified by the FOB or RFID card).</li> <li>- Method of training AAFC National Fleet Manager and up to seven (7) local fleet managers for implementation of the system including energy monitoring system, access control and payment system.</li> <li>- (Note: If proprietary equipment is offered, the equipment and energy monitoring system must integrate seamlessly with AAFC’s existing electric vehicle network data management: FLO Global Management System)</li> </ul>		
<b>4. Access Control</b> Provide an overview of how the EVSE will not permit the equipment to dispense electricity unless authorized. Provide the following minimum information:	25	17.5
<ul style="list-style-type: none"> <li>- Describe the equipment that will control access</li> <li>- Identify the method by which authorization is granted (RFID or FOB will be rated as more desirable than PIN pad).</li> <li>- Access control data must feed into the data management system in order to monitor and manage access.</li> </ul> <p>(Note: If proprietary equipment is offered, the equipment must integrate seamlessly with AAFC’s existing electric vehicle network monitoring system: FLO Global Management System.)</p>		
<b>5. Secure Payment System and Terminal</b> Provide an overview of how pay-per-use will be implemented. Provide the following minimum information:	25	17.5
<ul style="list-style-type: none"> <li>- Describe the equipment that will permit pay-per-use</li> <li>- clearly identify that data is encrypted</li> <li>- identify a secure third party service provider and substantiate their security credentials;</li> <li>- clearly explain how EVSE usage fees are collected and what the method is for quarterly dispersal of revenue to AAFC;</li> <li>- clearly identify any management fees, and explain what they are for, how they are collected and from whom they are collected.</li> </ul>		
<b>6. Training (2 pages maximum)</b> Provide an overview of how training will be offered in order to address the following:	5	3.5
<ul style="list-style-type: none"> <li>- Familiarization training of local Fleet Manager and/or Facility Manager at each location for usage of equipment and general maintenance.</li> <li>- Familiarization training for use of the data management system.</li> </ul>		
<b>TOTAL</b>	100	70



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**The technical information provided by the Tenderers will be scored according to the following rating scale:**

100% of points - Excellent:

Meets the desirable maximum that is considered useful.

90% of points - Very Good:

Very well defined, very thorough. Substantially exceeds the desired minimum.

80% of points - Good:

Slightly exceeds desirable minimum. Satisfactory details, sufficiently defined.

70% of points - Satisfactory:

Just meets desirable minimum. Adequate information, marginal/minimal details.

60% of points - Poor:

Below the desired minimum. Vague, not clearly defined, insufficient detail, unclear.

50 % of points - Not Valid:

Fails to meet desirable minimum. Missing information, incomplete, inconsistencies in proposal content.

0 points: No information.