

**Solicitation No. - N° de Sollicitation**  
EJ078-200154/001/FE

**Amd. No. - N° de la modif.**  
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**Buyer ID - Id de l'acheteur**  
FE181

**Client Ref. No. - N° de réf. du client**  
20200154

**File No. - N° du dossier**  
fe181-EJ078-200154

**Title of Project – titre du projet**  
875 HERON ROAD REHABILITATION  
PROJECT – TECHNICAL ADVISOR

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**APPENDIX F – SUBMISSION REQUIREMENTS AND EVALUATION (SRE)**

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## SRE 1 GENERAL INFORMATION

### 1.1 Calculation of Total Score and Basis of Selection

Total Scores will be established in accordance with the following:

Rating	Possible Range	% of Total Score	Score (Points)
Technical Rating	0 - 100	90%	0 - 90
Price Rating	0 - 100	10%	0 - 10
Total Score		100%	0 - 100

The Proponent receiving the highest Total Score and having achieved the overall passmark is the first entity that the Evaluation Board will recommend for the provision of the Required Services and Optional Services. In the case of a tie, the Proponent submitting the lower price for the services will be selected.

## SRE 2 PROPOSAL REQUIREMENTS

### 2.1 Requirement for Proposal Format

The following proposal format information should be implemented when preparing the proposal.

- Submit one (1) bound original plus five (5) bound copies of the proposal
- Paper size should be - 216mm x 279mm (8.5" x 11")
- Minimum font size - 11 point Times or equal
- Minimum margins - 12 mm (1.2 cm) left, right, top, and bottom
- Double-sided submissions are preferred
- One (1) 'page' means one side of a 216mm x 279mm (8.5" x 11") sheet of paper
- 279mm x 432 mm (11" x 17") fold-out sheets for spreadsheets, organization charts etc. will be counted as two pages
- The order of the proposals should follow the order established in the Request for Proposal SRE section

### 2.2 Specific Requirements for Proposal Format

The maximum number of pages (including text and graphics) to be submitted for the Rated Requirements under section SRE 3.2 is **fifty-five (55)** pages.

The following are not part of the page limitation mentioned above:

- Covering letter
- Consultant Team Identification (Appendix A)
- Declaration/Certifications Form (Appendix B)
- Price Proposal Form (Appendix C)
- Security Requirements Checklist (Appendix E)
- Integrity Provisions - Associated Information
- Front page of the RFP

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- Front page of revision(s) to the RFP

***Consequence of non-compliance: any pages which extend beyond the above page limitation and any other attachments will be extracted from the proposal and will not be forwarded to the Government of Canada Evaluation Board members for evaluation.***

PWGSC suggests, but does not prescribe, the following page-count breakdown for each rated requirement described in section SRE 3.2 as follows:

<b>Rated Requirement</b>	<b>Suggested Page-Count</b>
3.2.1 Achievements of Proponent on Relevant Projects	6
3.2.2 Achievements of Proponent Key Sub-Consultants on Relevant Projects	14
3.2.3 Achievements and Role of Key Personnel and other required personnel	12
3.2.4 Understanding of Project	6
3.2.5 Team Philosophy / Approach / Methodology	17

## **SRE 3 SUBMISSION REQUIREMENTS AND EVALUATION**

### **3.1 MANDATORY REQUIREMENTS**

***FAILURE TO MEET THE MANDATORY REQUIREMENTS WILL RENDER THE PROPOSAL AS NON-RESPONSIVE AND NO FURTHER EVALUATION WILL BE CARRIED OUT.***

#### **3.1.1 Licensing, Certification or Authorization**

The Proponent shall be an architecture and/or engineering firm licensed, or eligible to be licensed, certified or otherwise authorized to provide the necessary professional services to the full extent that may be required by provincial or territorial law in the Province of Ontario. Additionally, members of the Consultant Team shall be licensed, or eligible to be licensed, certified or otherwise authorized to provide the necessary professional services to the full extent that may be required by provincial or territorial law in the Province of Ontario.

#### **3.1.2 Consultant Team Identification:**

The Consultant Team to be identified must include the following:

Prime Consultant (Proponent)

- Architect or Engineer as Technical Advisor

Key Sub Consultants/Specialists:

- Architect (*Note to Proponent: applicable if Prime Consultant is not Architect. Proponent to state within their proposal whether Prime Consultant is Architectural Firm or Engineering Firm*)
- Civil Engineer
- Electrical Engineer
- Mechanical Engineer
- IT Engineer
- Sustainable Design Specialist

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If the proponent proposes to provide multidisciplinary services that might normally be provided by a Sub-Consultant, this should be indicated here.

Information required - name of firm, Key Personnel to be assigned to the project. Key Personnel shall be a Senior Resource as further defined in Appendix C.

An example of an acceptable format (typical) for submission of the team identification information is provided in Appendix A.

For the Prime Consultant and Key Sub-Consultants/Specialist, indicate current license and/or how you intend to meet the provincial or territorial licensing requirements. In the case of a joint venture identify the existing or proposed legal form of the joint venture (refer to R1110T General Instructions to Proponents, GI9 Limitation of Submissions).

### **3.1.3 Declaration/Certifications Form**

Proponents must complete, sign and submit the following:

- Appendix B, Declaration/Certifications Form.

### **3.1.4 Integrity Provisions – Required documentation**

In accordance with the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>), the Proponent must provide, **as applicable**, to be given further consideration in the procurement process, the required documentation as per R1410T (2017-08-17), General instructions (GI) – Architectural and/or Engineering services – Request for Proposal; **section 3a**.

### **3.1.5 Security Requirement**

**Before contract award**, the following conditions must be met:

Proponents must meet all the security requirements as specified in the Supplementary Instructions to Proponents SI7, Supplementary Conditions SC1 and Appendix E.

## **3.2 RATED REQUIREMENTS**

### **3.2.1 Achievements of Proponent on Relevant Projects**

The Proponent should describe their accomplishments, achievements and experience as a technical advisor in the capacity as described in the project brief, working on behalf of the owner of a Federal, Provincial or Municipal government or public institution on projects comparable and relevant to the complexity, Scope and budget as per the *Project Brief* in this RFP.

The Proponent should present three (3) projects undertaken in the last fifteen (15) years that are minimum 1-year into construction, or that have reached Substantial Completion, at the issuance date of this RFP as stated on the RFP cover page. The Proponent should demonstrate experience working on large (P3 Consortium contract greater than \$250 million) projects and P3 experience. Only the first three (3) projects listed in sequence will receive consideration and any others will not be evaluated.

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The Proponent should demonstrate its experience providing the Required Services and Optional Services for projects of similar scope as this Project, including the following:

- a) Project delivered under the P3 model.
- b) Functioning as a technical advisor working on behalf of the owner of a Federal, Provincial or Municipal government or public institution.
- c) Management of a multi-disciplinary P3 technical advisor team from Schematic Design to P3 Consortium Substantial Completion.
- d) Projects with environmental sustainability design (such as Carbon Neutrality or Carbon Neutral Ready), LEED Gold or Platinum, WELL certification, Living Building Challenge, SITES or equivalent.
- e) Experience in the design and construction/rehabilitation of office accommodation buildings.
- f) Experience in the design and construction/rehabilitation of assets designated as recognized or classified heritage by the Federal Heritage Buildings Review Office (FHBRO) or similar governing authority having jurisdiction.
- g) Experience coordinating approvals with Public governing authority having jurisdiction.

Information that should be supplied:

- 1) Project title, location, building program, building scale (m<sup>2</sup>), year started for the design services, year of P3 Consortium Substantial Completion (if applicable, or current status), P3 Consortium contract value, services provided, P3 procurement model used.
- 2) A clear demonstration of how the experience presented is comparable or relevant to criteria in section SRE 3.2.1 a) to g).
- 3) A project narrative, which should include a discussion of the approach used to meet the intent of the project, and the challenges encountered and resolutions employed. Narratives should include how key risks (e.g. costs, scope, schedule, adaptability of space, climate change, changing workplace arrangements, emerging technology, brownfield redevelopment, heritage, designated substances and NCC approvals) were managed and mitigated and how Facilities Management considerations were addressed.
- 4) A description of techniques employed for budget and schedule management.
- 5) Awards and external recognition received, if any.

Please indicate those projects which were carried out in Joint Venture and the responsibilities of each of the involved entities in each project.

### **3.2.2 Achievements of Proponent Key Sub-Consultants on Relevant Projects**

The Proponent should describe the Key Sub-Consultants' and Specialists' (as identified in section 3.1.2) firm/company accomplishments, achievements, knowledge and experience either as a Prime Consultant or a sub-consultant on two (2) projects per key sub-consultant and specialist that are comparable in terms of scope, scale and complexity of work, to the project described in the Project Brief. The projects should have been undertaken in the last fifteen (15) years that are either 1 year into construction or have reached Substantial Completion from the date of issuance of this RFP. Only the first two (2) projects listed in sequence for each identified Key Sub-Consultant will receive consideration and any others will not be evaluated. If the Proponent is providing the services of any or all of the Key Sub-Consultants, the Proponent shall provide all the information for such Key Sub-Consultant in this subsection based on the Proponent being deemed to be such Key Sub-Consultant as the case may be.

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With respect to projects described for each Key Sub-Consultant and Specialist, the Proponent should demonstrate its experience providing the Required Services and Optional Services for projects of similar scope as this Project:

- a) Project delivered under the P3 model.
- b) Functioning as a technical advisor or technical advisor sub-consultant working on behalf of the owner of a Federal, Provincial or Municipal government or public institution.
- c) Management of a multi-disciplinary P3 technical advisor team from Schematic Design to P3 Consortium Substantial Completion.
- d) Projects with environmental sustainability design (such as Carbon Neutrality or Carbon Neutral Ready), LEED Gold or Platinum, WELL certification, Living Building Challenge, SITES or equivalent.
- e) Experience working on medium-large (P3 Consortium contract greater than \$100 million) projects
- f) Experience in the design and construction/rehabilitation of office accommodation buildings.
- g) Experience in the design and construction/rehabilitation of assets designated by the Federal Heritage Buildings Review Office (FHBR) or similar governing authority having jurisdiction.
- h) Experience coordinating approvals with the Public governing authority having jurisdiction.

Information that should be supplied for each project:

- 1) Project title, location, building program, building scale (m<sup>2</sup>), year started for the design services, year of P3 Consortium Substantial Completion (if applicable, or current status), P3 Consortium contract value, services provided, P3 procurement model used.
- 2) A clear demonstration of how the experience presented is comparable or relevant to criteria in section SRE 3.2.2 a) to h).
- 3) A project narrative, which should include a discussion of the approach used to meet the intent of the project, and the challenges encountered and resolutions employed. Narratives should include how key risks (e.g. costs, scope, schedule, adaptability of space, climate change, changing workplace arrangements, emerging technology, brownfield redevelopment, heritage, designated substances and approvals with the Public governing authority having jurisdiction) were managed and mitigated and how Facilities Management considerations were addressed.
- 4) A description of techniques employed for budget and schedule management.
- 5) Names of Key Personnel engaged on the project who are included as proposed technical advisor team members for the Project, and brief description of their roles and responsibilities on the project.
- 6) Awards and external recognition received, if any.

### **3.2.3 Achievements and Role of Key Personnel and other Required Personnel**

The Proponent should provide CV's that describe the expertise, performance, achievements and experience of Key Personnel identified in Appendix A (Senior Resources) and other Required Personnel (listed below) to be assigned to this project (regardless of their past association with the Proponent). The Proponent should demonstrate that such Key Personnel and other Required Personnel's (in the requisite professional capacity) ability to effectively work on this project. This is the opportunity to emphasize the strengths of the individuals on the team, to recognize their past responsibilities, commitments and achievements.

**Key Personnel and other Required Personnel can only be proposed for one role and cannot perform multi-disciplinary roles. For example, the individual identified as a Senior Project Manager cannot also be the individual identified as the Architect or an Engineer. In the event that an individual is proposed for more than one role, PSPC will only evaluate the information provided for the first role in order of submission. The second role will not be evaluated and or rated.**

In addition to the Key Personnel, the following other required personnel will be evaluated:

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- Senior Project Manager
  - Senior Environmental Engineer
  - Senior Structural Engineer
  - Landscape Architect
  - P3 Procurement Advisor
  - Facility Maintenance Management Specialist

The Senior Project Manager should demonstrate experience working on a large (P3 Consortium contract greater than \$250 million) project. All other listed Key Personnel and other required personnel should demonstrate experience working on a medium-large (P3 Consortium contract greater than \$100 million) project.

Information that should be supplied for each personnel:

- 1) Proposed role in the technical advisor team
- 2) CV for personnel providing:
  - (a) Individual's name, title and name of firm
  - (b) Experience, including a list of relevant projects with a brief project description, the P3 model used (if applicable), location, role on the project, project value, duration of mandate. Can include experience as a member of private sector firm or public sector institution.
  - (c) Experience working as a technical advisory team member working on behalf of the owner of a Federal, Provincial or Municipal government or public institution, including drafting PSOS, FMOS and other schedules of the PA.
  - (d) Experience on projects with environmental sustainability design (such as Carbon Neutrality or Carbon Neutral Ready), LEED Gold or Platinum, WELL certification, Living Building Challenge, SITES or equivalent.
  - (e) Experience in the design and construction/rehabilitation of assets security requirements (physical and IT)
  - (f) Experience in the design and construction/rehabilitation of assets designated by the Federal Heritage Buildings Review Office (FHBRO) or similar governing authority having jurisdiction.
  - (g) Experience coordinating approvals with Public governing authority having jurisdiction.
  - (h) Professional accreditation or certification details (province, year, status, etc.) and other relevant qualifications required to deliver the complexity, Scope and budget as per the *Project Brief* in this RFP.
  - (i) A demonstration of services provided, roles, responsibilities, and degree of involvement of the individual on past projects that will corroborate the Key Personnel's experience and expertise relevant per the *Project Brief* in this RFP.
  - (j) Special accomplishments / achievements / awards.

### **3.2.4 Understanding of Project**

The Proponent should demonstrate an understanding of the Project Brief, Required Services (RS), Optional Services (OS) the functional / technical requirements, the constraints and the issues that will affect the design, P3 procurement model, and 1-stage/2-stage construction implementation strategies.

Information that should be supplied:

- 1) An interpretation of Project Scope's functional and technical requirements including the interrelation of complementary and / or co-dependent project components.

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- 2) A demonstration that the Proponent understands the full scope of the Required Services and Optional Services and deliverables expected. Provide a strategy for the execution of each phase.
  - 3) A critical assessment of broader goals as they relate to sustainable development as described in the Project Brief.
  - 4) Demonstrate an understanding of Project Scope's significant issues, challenges and constraints.
  - 5) Demonstrate an understanding of key Project risks, such as, but not limited to e.g. costs, Scope, schedule, adaptability of space, sustainability, changing workplace arrangements, emerging technology, brownfield redevelopment, heritage, designated substances, cost management and Public governing authority having jurisdiction.
  - 6) Demonstrate an understanding of foresight/futurism in the design of 875 Heron Road.
  - 7) Demonstrate an understanding of both the cost and schedule for the Required Services and Optional Services.

### **3.2.5 Team Philosophy / Approach / Methodology**

The Proponent should describe their capability and capacity to perform the Required Services and Optional Services and meet Project Brief challenges and objectives.

The Proponent should describe how they propose to organize and manage the delivery of all Required Services and Optional Services and deliverables and provide a plan of action and provide indicative levels of effort for the services in each phase. The Proponent should highlight its proposed approach and elaborate on aspects of the Required Services and Optional Services considered to be major challenges. This is the opportunity for the Proponent to state the overall philosophy of the team as well as the approach to delivering results and resolving issues with a particular focus on the specific aspects of the Required Services and Optional Services.

#### **Information that should be supplied:**

- 1) Understanding of the roles and responsibilities of the technical advisor working on a P3 on behalf of the Government of Canada.
- 2) Provide a strategy for the execution of the Required Services and Optional Services and deliverables expected.
- 3) Provide potential mitigation management strategies of key Project risks, such as, but not limited to e.g. costs, Scope, schedule, adaptability of space, sustainability, changing workplace arrangements, emerging technology, brownfield redevelopment, heritage, designated substances, cost management and Public governing authority having jurisdiction.
- 4) Provide an organizational chart based on the Required Services and Optional Services listed in the Project Brief for all the anticipated personnel envisioned by the Proponent to be assigned to this project, identifying names, position titles and reporting relationships.
- 5) GANTT schedule of the Required Services and Optional Services activities and estimated level of effort for personnel based on milestones provided in section PD 1.2 for the members of the technical advisor team to demonstrate the Proponent's proposed approach to managing the work.
- 6) Demonstrate how the schedule/milestone objectives outlined in section PD 1.2 will be met and how response times during the RS-1 Pre-Procurement and RS-2 Procurement phases will be minimized.
- 7) Describe the major challenges that the Proponent foresees and the approach that will be applied to those particular challenges, inclusive of challenges described in section PD 7.
- 8) Describe if and how technical advisor team members have worked together on past projects and how this can create synergies and efficiencies to benefit the Project.
- 9) Describe the approach to managing the one-stage and two-stage construction implementations strategy outlined

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in section PD 6.

10) Describe how the Proponent will integrate the Facility Management requirements with the design requirements during the project work.

### 3.3 EVALUATION AND RATING

Proposals will be reviewed, evaluated and rated by a Government of Canada Evaluation Board in accordance with the following:

<b>Criterion</b>	<b>Weight Factor</b>	<b>Rating</b>	<b>Weighted Rating</b>	<b>Overall Pass Grade</b>
3.2.1 - Achievements of Proponent on Relevant Projects	1.75	0 - 10	0 – 17.5	
3.2.2 - Achievements of Proponent Key Sub-Consultants on Relevant Projects	2	0 - 10	0 – 20	
3.2.3 - Achievements and Role of Key Personnel and other required personnel	2.5	0 - 10	0 - 25	
3.2.4 - Understanding of Project	1.25	0 - 10	0 – 12.5	
3.2.5 - Team Philosophy / Approach / Methodology	2.5	0 - 10	0 – 25	
<b>Technical Rating</b>			<b>0 - 100</b>	<b>65</b>

**Evaluation Table**

The Government of Canada Evaluation Board members will evaluate the strengths and weaknesses of the Proponent's response to the evaluation criteria and will rate each criterion with even numbers (0, 2, 4, 6, 8 or 10) using the evaluation table below:

	<b>INADEQUATE</b>	<b>WEAK</b>	<b>ADEQUATE</b>	<b>FULLY SATISFACTORY</b>	<b>STRONG</b>	
	0 point	2 points	4 points	6 points.	8 points	10 points
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 requirements	Little capability to meet performance requirements	Acceptable capability, should ensure adequate results	Satisfactory capability, should ensure effective results	Superior capability, should ensure very effective results	

Proponents **must** achieve a minimum overall passmark within the Technical Rating of sixty-five (65) points out of the one hundred (100) points available as specified above.

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**No further consideration will be given to Proponents not achieving the pass mark of sixty-five (65) points.**

#### **SRE 4 PRICE OF SERVICES**

1. To be declared responsive, a bid must:
  - a. Comply with all the requirements of the bid solicitation;
  - b. Meet all mandatory criteria; and
  - c. Obtain the required minimum of 65 points overall passmark for the technical evaluation criteria which are subject to point rating. (The rating is performed on a scale of 100 points.)
2. Bids not meeting (a), (b) and (c) will be declared non-responsive.
3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 90% for the Technical Rating and 10% for the Price Rating.
4. To establish the Technical Rating, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by 90%.
5. To establish the Pricing Rating, each responsive bid will be prorated against the lowest evaluated price and then multiplied by 10%.
6. All responsive price proposals which are greater than 35 percent above the average price will cause their respective complete proposals to be set aside and receive no further consideration. An average price is determined by adding all of the responsive Proponents' price proposals together and dividing the total by the number of price proposals being opened.
7. For each responsive bid, the Technical Rating and the Pricing Rating will be added to determine its Total Score.
8. Neither the responsive bid obtaining the highest Technical Rating nor the one with the lowest Price Rating will necessarily be accepted. The responsive bid with the highest Total Score will be recommended for award of a contract.

The table below illustrates an example where all three bids are responsive and the selection of the Consultant is determined by a 90/10 ratio of Technical Rating and Price Rating, respectively. The total available points equals 100 and the lowest evaluated price is \$8,850.00.

Basis of Selection – Total Score of based on Technical Rating (90%) and Price Rating (10%)

		Proponent 1	Proponent 2	Proponent 3
	Overall Total Score	65/100	70/100	78/100
	Bid Evaluated	\$9,850.00	\$8,850.00	\$10,500.00

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	Price			
Calculation	Technical Rating	65/100x90=58.5	70/100x90=63	78/100x90=70.2
	Pricing Rating	8850/9850x10=8.98	8850/8850x10=10	8850/10500x10=8.43
Total Score		67.48	73	78.63
Rank		3 <sup>rd</sup>	2 <sup>nd</sup>	1 <sup>st</sup>

### SRE 5 SUBMISSION REQUIREMENTS – CHECKLIST

The following list of documents and forms is provided with the intention of assisting the Proponent in ensuring a complete submission. The Proponent is responsible for meeting all submission requirements.

Please follow detailed instructions in R1410T General Instructions to Proponents, G116 Submission of proposal. Proponents may choose to introduce their submissions with a cover letter.

- Team Identification - see typical format in Appendix A
- Declaration/Certifications Form- completed and signed - form provided in Appendix B
- Integrity Provisions – Required documentation – **as applicable** in accordance with the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>) and as per R1410T (2016-04-04), General instructions 1 (G11), Integrity Provisions – Proposal, **section 3a**.
- Integrity Provisions- Declaration of Convicted Offences – **with its bid, as applicable** in accordance with the Ineligibility and Suspension Policy (<http://www.tpsgc-pwgsc.gc.ca/ci-if/politique-policy-eng.html>) and as per R1410T (2016-04-04), General instructions 1 (G11), Integrity Provisions – Proposal, **section 3b**.
- Proposal - one (1) original plus five (5) copies
- Front page of RFP
- Front page(s) of any solicitation amendment

#### In a separate envelope:

Price Proposal Form - one (1) completed and submitted in a separate envelope