

# **ANNEX C**

## **BID EVALUATION PLAN (BEP)**

**for the**

**IN-SERVICE SUPPORT**

**of the**

**VICTORIA CLASS TRAINER**

**PROJECT**

## REVISION NOTICE

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## 1 Introduction

### 1.1 Purpose

The purpose of this Bid Evaluation Plan (BEP) is to describe the objectives, selection methodology and processes that will be used for the bid evaluation of the proposals (bids) received in response to the Request for Proposal (RFP) Solicitation W8482-195554 for the ISS (In-Service Support) of the Victoria Class Trainer (VCT) Project.

### 1.2 Objectives

The objectives of this bid evaluation are to:

- 1.2.1 Score the bidders' proposals in accordance with the mandatory and rated requirements as per this BEP;
- 1.2.2 Provide consensus scores with rationale for each rated bidder's response to these requirements;
- 1.2.3 Provide a final report to Public Services and Procurement Canada (PSPC) stating the scores for each compliant bidder and their rankings.

### 1.3 Conduct of the Evaluation

The evaluation team and all those involved in the evaluation process will exercise integrity and apply consistency in their approach to the evaluation.

#### 1.3.1 Integrity

Bidder proposals will be only be evaluated against the requirements in the RFP using the evaluation criteria in this BEP.

#### 1.3.2 Consistency

Each evaluator will in their individual approach to the scoring, consistently apply the evaluation criteria across all bidders' responses. Final scoring will be allocated by consensus.

### 1.4 Acronyms

BEP	Bid Evaluation Plan
CA	Contracting Authority
CDRL	Contract Data Requirements List
DND	Department of National Defence
MCT	Machinery Control Trainer
OSR	On Site Representative
PM	Project Manager
PSPC	Public Services and Procurement Canada
RFC	Request for Clarification
RFP	Request for Proposal
SBS	Submarine Control Trainer
SOW	Statement of Work

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TWS	Tactical Weapons
WHDST	Weapons Handling and Discharge System Trainer

## **2 Contractor Selection Methodology**

### **2.1 Proposal Content**

Bidders will be required to submit their proposals in accordance with the Instructions to Bidders contained in Solicitation W8482-195554. Evaluations will be based solely on the proposals submitted by the bidders. The Bidders are advised to address each requirement in sufficient depth to permit a complete analysis and evaluation by the Evaluation Team. In developing their proposals, bidders must bear in mind the individual requirements found in the following sections:

1. Mandatory requirements found at Appendix 1 to ANNEX C; and
2. Point rated requirements at Appendix 2 to ANNEX C.

### **2.2 Method of Evaluation**

#### **2.2.1 General**

All bids will be evaluated based on price and mandatory and rated requirements. The PSPC Contracting Authority (CA) will evaluate and score the price. The Department of National Defence (DND) Evaluation Team will determine how the bid meets the mandatory and rated requirements.

#### **2.2.2 Mandatory Requirements Evaluation System**

Mandatory requirements are scored Pass or Fail. Proposals that do not meet all mandatory requirements will be considered to be non-compliant and will not be assessed further. The Bidder shall reference where demonstration of compliance may be found in their submission, and indicate this reference in the “Proposal Ref.” column of all Tables for each requirement.

#### **2.2.3 Rated Requirements Evaluation System**

The point-rated requirements are based on technical features of the offer that are beyond the minimum mandatory requirements. These features are assessed and scored to determine the offer’s added value above the minimum mandatory requirements;

The bidders will be scored with respect to each point-rated requirements. Appendix 2 Rated Criteria, is divided into 3 sections, Technical Proposal, Management Proposal and Comprehension.

Point-rated requirement will be assessed and scored individually by Evaluation Team members in accordance with the “Evaluation Criteria”. Bidders are to demonstrate how they meet the point rated criteria (see Paragraph 3.2 for details).

A meeting of the Evaluation team will then determine the consensus scores and they will be entered into the “Score” column.

In order for a proposal to be compliant, each section of the rated criteria must meet the minimum score threshold of 60% (see Table 1).

#### **2.2.4 Final Score**

Proposals will be assigned a final score out of 100 based on technically scored rated requirements and a financial score. The final score is calculated as follows:

$$\text{Final Score} = \text{Technical Score} + \text{Financial Score}$$

The maximum scores that can be achieved are as follows:

Technical Score	70
Financial Score	30

Calculation of technical and financial scores are explained below.

##### **2.2.4.1 Technical Score**

The compliant proposal with the highest rated requirements score will be awarded a technical score of 70. All other proposals are prorated as follows:

$$\text{Technical Score} = \left( \frac{\text{Individual Compliant Proposal Score}}{\text{Highest Compliant Proposal Score}} \right) * 70$$

##### **2.2.4.2 Financial Score**

The PSPC CA will award the compliant proposal with the lowest bid price a financial score of 30. All other proposals are prorated as follows:

$$\text{Financial Score} = \left( \frac{\text{Lowest Compliant Proposal Price}}{\text{Individual Compliant Proposal Price}} \right) * 30$$

Proposals which do not provide price information will be awarded a financial score of zero.

### 2.2.5 Summary

Table 1 summarizes the method of evaluation for this BEP.

**Table 1: Method of Evaluation Summary**

Evaluation	Maximum Possible Score	Minimum Score to Pass (60%)	Bidder Score
<b>Mandatory Requirements</b>	<b>N/A</b>	<b>All Pass</b>	
<b>1 –Technical Proposal</b>	550	330	
Project Manager	65		
SCT/MCT OSR #1	65		
SCT/MCT OSR #2	65		
SCT/MCT OSR #3	65		
SCT/MCT OSR #4	65		
WHDST OSR	65		
TWS OSR	80		
Misc. OSR	70		
Building support	10		
<b>2 - Management Proposal</b>	145		87
<b>3 - Comprehension</b>	65	39	
<b>Total bidder Score</b>	760	456	

Note: Only bids satisfying all mandatory requirements will be assessed on rated criteria.

### 2.3 Contractor Selection

The PSPC CA will recommend contract award to the bidder with the compliant proposal which achieves the highest final score.

### **3 Bid Evaluation Process**

#### **3.1 Introduction**

In the Bid Evaluation Process, the mandatory requirements will be evaluated first and those proposals that are compliant will then be evaluated for the rated criteria.

All initial evaluations, both mandatory and rated, will be done individually by the members of the Evaluation Team. For each requirement, the Evaluation Team members will individually assess the bidder's provided objective evidence and assign a score to that evaluation.

The Evaluation Team will meet and compare scores. Where differences in an evaluation exist between team members, the rationale for these differences will be discussed and a score will be assigned, based on consensus.

The Evaluation Team will prepare a consolidated Technical Bid Evaluation Report which summarizes the results of the evaluation of each proposal. This report will be forwarded to the PSPC CA.

#### **3.2 Bidder Guidelines**

In their proposal, the bidder must provide objective evidence that their bid will meet mandatory requirements. To avoid confusion and facilitate evaluation, bidders when addressing a requirement, matter or topic in all parts and sections of their bids must properly identify the specific part, section, paragraph, table, figure and page number, as applicable, in the "Proposal Ref." column.

Clarifications may be sought, through the Request for Clarification (RFC) process, if doubt exists with respect to the Bidder's compliance with a requirement. The RFC process is described in Section 3.5. In the event that any mandatory requirement is not addressed or after RFC is still not assessed as a Pass, the proposal will be considered non-compliant, rejected and given no further consideration.

#### **3.3 Evaluation of Mandatory Requirements**

Mandatory Pass or Fail requirements and the associated evaluation matrix can be found at Appendix 1 to this Annex. A proposal must comply with all mandatory requirements. Compliance with a mandatory requirement indicates that the bidder claims complete agreement with, or complete acceptance of, all elements of the requirement as presented.

### **3.4 Evaluation of Rated Requirements**

#### **3.4.1 Technical Rated Requirements**

The bidder's proposal response to technical requirements will be evaluated using the SOW Rated Requirements Assessment Sheet at Appendix 2, Table 1. Objective evidence required for evaluation is as follows:

- Resumes for the following personnel:
  - Project Manager (PM)
  - 4 SCT/MCT OSRs
  - TWS OSR
  - WHDST OSR
  - Miscellaneous OSR

To avoid confusion and facilitate evaluation, bidders when addressing a rated criteria must refer and fully and properly identify the specific part, section, paragraph, table, figure and page number, as applicable, into the "Proposal Ref." column.

#### **Additional Guidelines:**

- 1. When calculating months of experience, round down to the lowest month from the start date to the end date.**
- 2. Ensure the experiences periods are non-overlapping.**

#### **3.4.2 Management Rated Requirements**

The management bid shall address each element of Appendix 2, Table 2 to the Bid Evaluation Plan.

The following criteria shall be used in accordance with the rated evaluation of the bidder's response:

<u>Score</u>	<u>Description</u>
5	<p>Proposed approach offers much more than what would normally be expected for this type of project, to the extent that successful support/delivery should be a certainty.</p> <ul style="list-style-type: none"><li>-Complete, well-presented and clear details are provided, addressing all of the required elements.</li><li>-The majority of the approaches, functions, processes, methods, tools and techniques are well established, proven and sound.</li><li>-The information provided indicates a high probability of delivering the capability.</li></ul>
3	<p>Proposed approach is appropriate for this type of project and should ensure successful support/delivery.</p> <ul style="list-style-type: none"><li>-The details provided in addressing the majority of the required elements are clear and complete,</li><li>-Only a few of the required elements are not addressed to an acceptable level of detail,</li><li>-The majority of the approaches, functions, processes, methods, tools and techniques are considered adequate,</li><li>-The information provide indicates a medium probability of delivering the capability.</li></ul>
1	<p>Proposed approach is lacking in some major aspects such that successful support/delivery will involve significant risk.</p> <ul style="list-style-type: none"><li>-The information provided, if any, does not address at the majority of the required elements.</li><li>-The approaches, functions, processes, methods, tools and techniques are considered inadequate.</li><li>-The information provide indicates a low probability of delivering the capability.</li></ul>
0	<p>Proposed approach is inadequate.</p> <ul style="list-style-type: none"><li>-The information provided does not address any of the requirements</li></ul>

### 3.4.3 Comprehension Rated Requirements

The Comprehension bid shall address each element of Appendix 2, Table 3 to the Bid Evaluation Plan.

The following criteria shall be used in accordance with the rated evaluation of the bidder's response:

<u>Score</u>	<u>Description</u>
5	The bidder has conveyed an exceptional understanding of the requirement, such that they should be able to ensure support/delivery with minimal risk. -Proposal meets the requirements as stated in the SOW. -Describes solution capabilities and their applicability in a DND context. -Solution capabilities are described at a high level of detail and specific to the requirements as stated.
3	The bidder has conveyed that their understanding of the requirement is sufficient to ensure support/delivery with acceptable risk. -Proposal meets the requirements as stated in the SOW. -Solution capabilities are described at a low level of detail.
1	It is evident that the bidder's understanding is lacking in some major aspects, such that their support/delivery may involve significant risk. -Proposal meets partial requirements as stated in the SOW. -Information provided is vague and lacks specifics to the stated requirement.
0	It is evident that the bidder's understanding is insufficient to ensure an acceptable support/delivery. -Proposal does not meet the requirement. -Insufficient information is provided to determine if requirements will be met.

## **3.5 Request for Clarification**

### **3.5.1 Process**

The Request for Clarification (RFC) Process is outlined in Figure 1 below.

### **3.5.2 Evaluation Manager Role and Responsibilities**

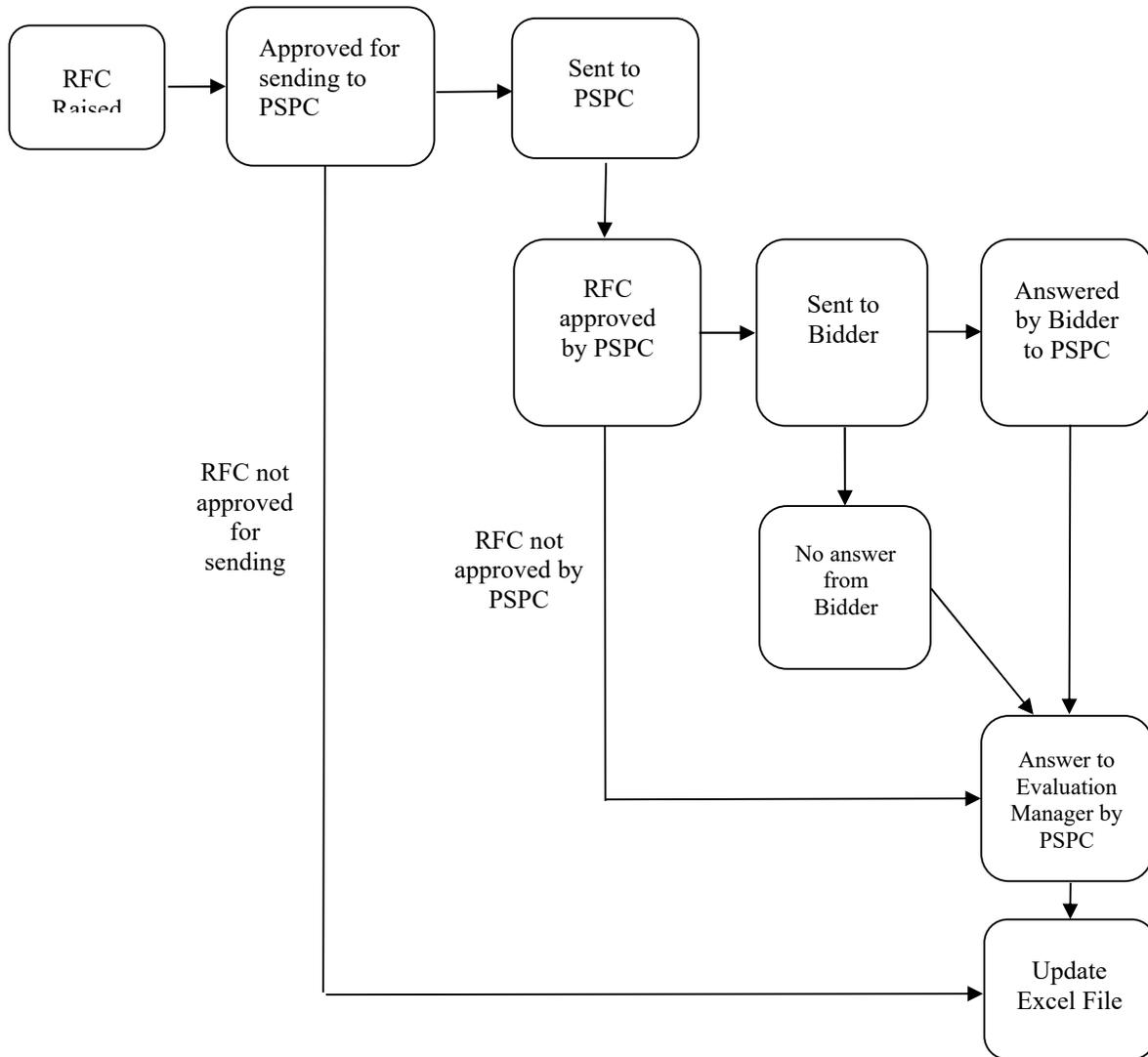
The Evaluation Manager will manage the RFC process and make the necessary changes to the Technical Team Member's original request to ensure that RFCs do not solicit the Bidder for additional information. The Evaluation Manager will forward the RFC to PSPC for onward transmission to the Bidder. Bidders shall have the period indicated on the RFC to respond. Canada may disqualify any Bidder who fails to comply with such a request within the specified response period. Once the Bidder's response to the RFC is received by PSPC, it will be forwarded to the Evaluation Manager, who will update the answer to the RFC and notify the team. At any point throughout the evaluation process the Technical Team Members can view all outstanding RFCs raised by the team.

### **3.5.3 Raising an RFC**

An RFC can be raised by any Technical Team Member or Team Lead. When a requirement has an RFC raised against it, this requirement will be suspended from scoring by all other Technical Team Members until the RFC is answered or rejected by the Evaluation Manager.

### **3.5.4 Bidders Response to an RFC**

The RFC flow diagram can be found in Figure 1 below.



**Figure 1: Request for Clarification (RFC) Process Flow Diagram**

## 4 Appendices

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Appendix 3 BEP Financial Evaluation Criteria