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RFQ Evaluation Process

Valley Line LRT - Stage 1

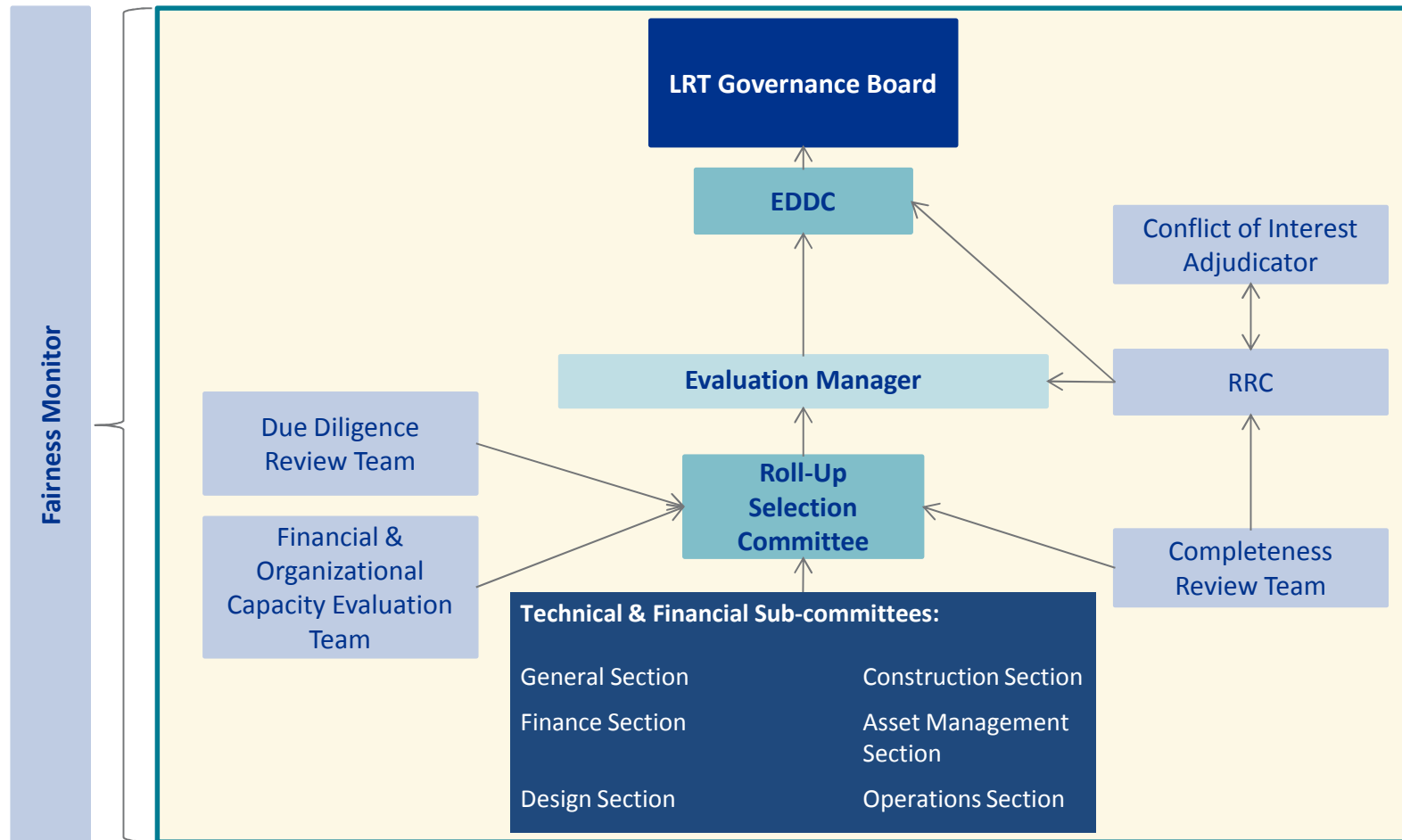
LRT Governance Board August 01, 2014



RFQ Timetable Overview:

- Issuance - 23rd April 2014
- Submission Deadline - 17th June 2014
- Evaluation Process:
 - Completeness;
 - Relationship Disclosure and Conflict of Interest declarations;
 - Submission Reviewing and clarifications (10 days)
 - Clarification Process;
 - Reference Checks (over 30 calls and emails);
 - News Scans + Broker Report reviewing;
 - Daily Team Meetings
 - Consensus Meetings (1 week)
 - Roll Up Committee peer-review
 - EDDC due diligence review

RFQ Evaluation Governance:



Evaluation Manager:

- COE Materials Management Branch
- Supported by the P3 Process Advisor (KPMG)
- Developed and managed the evaluation schedule
- Facilitated the evaluation process, training, communications and consensus meetings
- Custodian of evaluation documentation and report
- Documented the evaluation process and monitors procedure adherence

Fairness Monitor:

- Gary Campbell, GGC Consultants Inc.
- Monitored process for fairness, transparency and objectivity
- Was present for all consensus meetings and meetings of the various committees

Relationship Review Committee (RRC):

- Reviewed the declarations made by Respondents including relationship disclosures
- Reviewed the relationship disclosures of Evaluators

Completeness Review Team:

- Material Management, Evaluation Manager & Process Advisor Team.
- Responsible for reviewing submissions and ensuring all required sections, forms and attachments were included
- Responsible for extracting all names of organizations and individuals noted in each submission, and providing Evaluators with this list to declare conflicts of interest (if any)

The RFQ Evaluation was split into multiple committees:

Pass/fail scoring:

- Completeness Review
- Financial and Organizational Capacity
- Due Diligence Information

Points scoring:

- General
- Financing
- Design
- Construction
- Asset Management and Preservation of Project Infrastructure
- Operations

Evaluators

- suitably qualified individuals drawn from the Project Team (LRT D&C, Owners Engineer, P3 Advisor teams, City subject matter experts)
- Form the technical and financial sub-committees
- Tasked with scoring submission section using consensus methodology (against the RFQ criteria)
- Completed evaluator training in advance

- There was a clear reporting structure and roles and responsibilities for all Evaluators, including the presence of a Team Lead for each subcommittee
- Team Leads also formed the Roll-up Committee that undertook a peer-review of the scoring of each section

The RFQ Evaluation Criteria Weighting: Reminder

Item	Evaluation Criteria	Weight
1	Mandatory Requirements	Pass/Fail
2	Additional Process Requirements	Pass/Fail
3	Financial and Organizational Capacity	Pass/Fail
4	Due Diligence Information	Pass/Fail
5	General	15
6	Financing	10
7	Design	21
8	Construction	21
9	Asset Management and Preservation of Project Infrastructure	13
10	Operations	20
	Total	100

The RFQ Scoring Scale: Reminder

Rating Score	Definition
5	Excellent and complete understanding of the requirement; has an excellent probability of success; exceeds expectations.
4	Good and complete understanding of the requirements; high probability of success; somewhat exceeds expectations.
3	Good understanding of the requirements or has minor gaps in completeness; good to fair probability of success; meets expectations.
2	Moderate understanding of the requirements or has left some gaps in completeness; fair to low probability of success; somewhat meets expectations.
1	Poor / lack of understanding of the requirements or has left major gaps in completeness; low probability of success; mainly does not meet expectations.
0	Complete misunderstanding of the requirements or no response; no probability of success; does not meet expectations entirely.

EDDC:

- Oversaw the evaluation process, ensuring that all Evaluators diligently perform their roles (at least 1 member present at consensus meetings and in evaluation office)
- Confirm the pre-established evaluation process has been followed
- Confirm the pre-established evaluation criteria have been applied diligently, consistently and without bias
- Review evaluation report and findings
- Confirm shortlist recommendation



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Questions?