

TECHNICAL PROPOSAL AND QUALIFICATIONS

SECTION 1 – MANDATORY TECHNICAL REQUIREMENTS

Mandatory Technical Requirement:

Note: Suppliers must submit separate proposals for 4610 Finch Ave and George Street. If a Supplier wishes to submit for only one (1) Project, then all mandatory requirements submitted must be for that project and be clearly marked as such.

Submissions must demonstrate compliance with the Mandatory Requirement listed below to be considered.

1. The Proponent must have a current Certificate of Practice. Proof satisfactory to the City that the Proponent meets this requirement may be required prior to any award.
2. Bid Submission Form (Part 4 – Form A)
3. Technical Proposal (Part 4 – Form B) – One (1) for each Project
4. Pricing Form (Part 5) – One (1) for each Project: Form A – 4610 Finch SSLTC and/or Form B – George St Revitalization

SECTION 2 – TECHNICAL PROPOSAL

2.1 General

- .1 Technical Proposals are expected to address the nRFP content requirements as outlined herein, and should be well ordered, detailed and comprehensive. Clarity of language, adherence to suggested structuring, and adequate accessible documentation is essential to the City's ability to conduct a thorough evaluation. The City is interested in Proposals that demonstrate efficiency and value for money. General marketing and promotional material will not be reviewed or considered.
- .2 The City prefers that the assumptions used by a Supplier in preparing its Bid are kept at a minimum and to the extent possible, that Suppliers will ask for clarification prior to the deadline for questions rather than make assumptions. Suppliers should also review section 1.8 of Part 1 (RFP Process) with respect to asking questions about the nRFP. Where a Supplier's assumptions are inconsistent with information provided in the nRFP, or so extensive that the total Bid cost is qualified, such Supplier risks disqualification by the City in the City's sole discretion.
- .3 No cost information shall be included in the body of the Technical Proposal portion of the Bid or it will be rejected.
- .4 Technical Proposals should preferably be limited to 60 pages with 11-point font, with unlimited appendices in PDF Format. Suppliers should upload the requested Technical Proposal as a PDF attachment (unless otherwise specified in the sections below) where indicated in Part 4 - Form B in the online system.

- .5 The Proposal should contain the following items outlined in 2.2 – Technical Proposal Content below.

2.2 Technical Proposal Content

.1 Letter of Introduction

- .1 Attach a letter introducing the Supplier and signed (or electronically signed) by the person(s) authorized to sign on behalf of and to bind the Supplier to statements made in response to this nRFP. This should be the same authorized signing officer of the Supplier who is indicated in the submission form (Form A of Part 4).

.2 Subsection 1 – Executive Summary

- .1 The Supplier should provide a summary of the key features of the Technical Proposal.

.3 Subsection 2 – Supplier Profile

Note: Suppliers who wish to be considered for both projects must submit separate proposals for 4610 Finch Ave and George St. If a Supplier wishes to submit for only one project, then all forms submitted must be for that project and be clearly marked as such.

Suppliers should have the staff and organization to ensure their ability to deliver and support the proposed project, or projects if they were the successful proponent on both projects (4610 Finch Ave E or GSR project) within the respective contract time period.

- .1 To permit the Supplier to be evaluated fully as a viable and sound enterprise, include the following information with respect to the Supplier, and if applicable, for each Joint Venture member.
- .1 A profile and summary of corporate history including:
- date company started – identify the number of years in continuous operation;
 - products and/or services offered – highlighting areas of expertise most relevant to the Scope of Services
 - total number of employees – identify your staff turnover rate and if you have a collective bargaining agreement in place with your employees
 - major clients; and
 - business partners and the products/services they offer.
 - Culture of your organisation
- .2 a profile and summary of corporate history of any parents or subsidiaries and affiliates and the nature of the Supplier's relationship to them (i.e., research, financing and so on).

- .3 a copy of the Supplier's and if applicable for each Joint Venture member, Corporate Profile Report(s) (Ontario), or equivalent official record issued by the appropriate government authority
- .2 If the Supplier is a member of a Joint Venture, provide a description of the relationship(s) between Joint Venture members. Please note Part 1 – Section 3.14 regarding Joint Venture Bids.
- .3 The Supplier should demonstrate its commitment to diversity in its organization by providing:
 - a company-approved supplier diversity policy that details the Supplier's commitment to an active supplier diversity program and describes a commitment to providing equitable access to subcontracting opportunities for diverse suppliers and demonstrated results of the policy; and
 - a company-approved diverse hiring policy describing the Supplier's commitment to a pro-active employment diversity program and demonstrated results of the policy.
- .4 Diverse Supplier: If the Supplier is certified by a Supplier Diversity Organization, the Supplier should provide evidence of such certification.

.4 Subsection 3 – Experience and Qualifications of the Supplier

It is important that the work be undertaken by a Supplier who can demonstrate specific knowledge of Project Management, and experience in performing similar work for three (3) projects of comparable **nature, size, cost, and scope** that have been completed within the past ten (10) years. Please note that at least **one (1) project must be a government project**; at least **one (1) project must have a completed successful delivery of minimum budget of \$300M** - private or government; at least **one (1) project must show experience working on a similar scope project**. Please note that any incorrect or misleading information may result into a disqualification. The three (3) references will be utilized for both GSR and 4610 Finch.

In particular, the Supplier should demonstrate the following:

- .1 Experience of the Supplier with other similar projects for both GSR And 4610 Finch projects.
- .2 Necessary skills, experience and expertise in the delivery of the proposed Project Management Services, and, based on these skills, experience and expertise, how they will ensure that the proposed services are appropriate for the use to be made of them as set out in this nRFP.
- .3 Utilizing Part 4 – Form D References Form, provide three (3) references, as outlined above, for the purpose of evaluating the Supplier's experience and track record of success. Note that the City prefers references for projects that are similar to the project

management plan being proposed in response to this nRFP. For example, project management plan for the municipal/public sector, using the same or similar products proposed, projects of similar size, scale and complexity. Each reference should include:

- the identity of the reference client organization;
- a contact name and title, address, email, and telephone number;
- the size and nature of the client's business; Private or Government?
- the number of years dealing with the client;
- a description of the project;
- the timing and duration of the Supplier's involvement in the project;
- Project start date, duration and end date (or projected completion date). Was this project completed on schedule? If not, please explain.
- details regarding the scale of the project; original project value and final project value (including any change orders). Explain if there is a difference;
- Indicate if your company has experience working on a project that adheres to Toronto's Green Building Standards or a Net Zero project with high performance building construction techniques. Provide a description of the processes undertaken to meet these performance standards; and
- client's URL address.

- .4 In providing references, Suppliers agree that the City can contact the individuals provided as part of the evaluation process. The City will make its own arrangements in contacting the references. Substitution of references will not be permitted after the close of the nRFP.

Suppliers who are bidding on both the 4610 Finch and the GSR projects are only required to submit one (1) set of references.

Subsection 4 – Proposed Staff Team and Resources, 2 separate sets dedicated for each GSR and 4610 Finch projects.

It is important that the work be undertaken by a team who can demonstrate specific knowledge of, and experience in performing similar work for projects of comparable nature, size and scope. **Two separate submissions are required – one for GSR and one for 4610 Finch. Each submission must address all requirements below.**

It is important that key project individuals (i.e. major areas of responsibility) be named, with accompanying indication of guaranteed availability. Continuity of key personnel will be required, with a contractual obligation for substitutions only with full written approval of the City. Please note that any changes in the names or officials submitted part of this nRFP bid submission, will need City of Toronto's Manager approval, upon formal submission of same details/documents requested under this Subsection as referred below. Any incorrect or misleading information may result into a disqualification.

In particular, the Supplier should provide the following:

- .1 A list of key staff that the Supplier would propose to use for this work together with their professional qualifications, related project experience and an indication of their duties and responsibilities on this particular project.
- .2 Include strategies and individuals that can fulfill the roles and responsibilities for any unforeseen events requiring replacement of team members.
- .3 Attach resumes for proposed individuals.
- .4 Provide a statement of any conflict of interest, if applicable. Refer the Supplier Code of Conduct for information relating to conflicts of interest.

The Supplier should attach signed consent forms authorizing the disclosure of personal information to the City, or its designated agent(s), for any resumes that are submitted; however, the Supplier will accept all liability if signed consent forms and resumes are not disclosed to the City.

Note: If the Supplier should choose to submit proposals for both projects, and put forward two teams, one each for the 4610 Finch Ave and George St projects, then this list and table will be used to evaluate any overlap of resources between the projects. The City expects that the teams assigned to each project are separate, with no overlap of personnel except at the senior executive level, or part-time experts such as Scheduler or finishing superintendents, etc. The Supplier should provide an explanation of any overlap, which may become part of the negotiation for any contract award. The City, in its sole discretion, will determine if any overlap of resources is acceptable.

Subsection 5 – Work Plan and Deliverables

It is important that the project is started and completed in an efficient and effective manner. Note: **Two separate submissions are required – one for GSR and one for 4610 Finch. Each submission must address all requirements below.** The Supplier is requested to provide:

5.1 Strategic Plan & Methodology Overview

1. Provide your company's methodology and plan of action to address each task in the Scope of Work.
2. Include a brief overview of your strategic plan to deliver the SOW and explain why your organization is best suited to deliver this nRFP.
3. Demonstrate full understanding of the scope and client expectations.

5.2 Project Phases & Activity Breakdown

1. Describe project phases and provide a breakdown of activities with primary deliverables for each activity.
2. Articulate key assumptions and contingencies.

5.3 Responsibilities & Capabilities

1. Provide a comprehensive accounting of responsibilities for your company and others to ensure successful outcomes.
2. Differentiate between current and planned capabilities, if applicable.

5.4 Work Plan & Timeline

1. Submit a detailed work plan including project method, schedule, Gantt chart, tasks within each phase, and deliverables.
2. For each deliverable, provide sufficient detail identifying practices, process steps, technologies involved, key challenges, and mitigating actions.
3. Provide an estimated overall timeline and indicate how soon work can commence.
4. Demonstrate proactive schedule management to minimize critical path delays, including practices, processes, and technologies used.

5.5 Risk Management & Quality Assurance

1. Include a risk register with mitigation strategies and contingency plans.
2. Define quality assurance checkpoints and performance metrics for deliverables.

5.6 Sustainability & Innovation

1. Describe sustainability practices integrated into the project.
2. Highlight innovative approaches or technologies proposed.

5.7 Tools, Systems & Technologies

1. List tools, systems, and technologies your company will use to deliver the project.
2. Highlight any new technologies and explain how they will contribute to successful delivery.

5.8 Cost Estimation & Value Engineering

1. Describe practices, processes, and technologies used to support cost estimation and value engineering.
2. Identify drivers of cost estimation accuracy and key challenges.

5.10 Regulatory Knowledge

1. Demonstrate comprehensive knowledge of applicable building codes and local government requirements.

5.11 Quality Assurance & Issue Management

1. Describe QA practices and how your company will minimize quality-related issues.
2. Explain how such issues will be addressed if they occur.

5.12 Stakeholder Communication

1. Demonstrate how your company will effectively communicate with numerous stakeholders throughout the project.

5.13 Health & Safety Commitment

1. Describe your firm's commitment to minimizing work-related injuries and ensuring safety compliance.

5.14 Lessons Learned

1. Provide an example of when your firm could not meet SOW deliverables and how challenges were addressed.
2. If no such instance exists, share lessons learned from past projects and corrective actions planned.

5.15 Additional Services

1. Describe any add-on services beyond the nRFP scope that your company would provide.

Subsection 6 – Resource Management Plan

The Supplier's Resource Management Plan outlines a clear strategy for allocating, coordinating, and overseeing project personnel to ensure timely and effective delivery. It identifies key team members, their roles, responsibilities, and availability, along with processes for workload balancing, communication, and performance monitoring. The plan also includes contingency measures to address unexpected staffing changes, ensuring continuity and minimizing project risk through documented backup resources and defined escalation procedures.

Suppliers are required to download, complete, and submit PART 4 – Form C Resource Management Plan with the required details included for each project they are bidding on.

Subsection 7 – Key Performance Indicators (KPI)

All deliverables outlined in this nRFP are directly linked to the **Key Performance Indicators (KPI) Matrix** provided as part of this procurement. Proponents must ensure that their submissions clearly demonstrate how each deliverable aligns with and supports the achievement of these KPIs. **Compliance with the KPI Matrix will be a critical component of performance evaluation throughout the project lifecycle.**

Please note: This subsection will apply to both projects. Only one (1) response for this subsection is required, regardless of which projects are being bid on.

SECTION 3 – RATED CRITERIA

Evaluation Table

The following sections set out the categories, weightings and descriptions of the rated criteria for the nRFP. Suppliers who do not meet a minimum threshold score for a category or sub-criteria will not proceed to the next stage of the evaluation process.

The City will not have any knowledge of any information contained in the Part 5 - Pricing Form until evaluations for the Technical Proposal portion of the Bid are complete and Suppliers have been short-listed. The City uses an electronic envelope for Part 5 within the City Online Procurement System which is only opened once Suppliers have been short-listed.

Evaluation criteria table contains a summary of technical evaluation criteria as a reference however it is Suppliers' responsibility to go through the technical evaluation criteria sub-sections in detail here in this Part 4 Form B without making any assumptions.

Table 1: Evaluation Table

| Stage | Category | Sub-Criteria | Weight (Points) | Minimum Threshold | Notes |
|----------------|---|---|------------------------|--------------------------|--|
| Stage 1 | Mandatory Requirements | Mandatory Submission Requirements | Pass/Fail | N/A | Must meet all mandatory requirements |
| Stage 2B | Operational & Technical Capabilities and Qualifications | Supplier Profile | 15 | Minimum 10 points | Supplier Profile |
| | | Experience and Qualifications of the Supplier | 20 | Minimum 10 points | Supplier to demonstrate specific knowledge of Project Management, and experience in performing similar work for at least 3 (Three) projects of comparable nature, size, cost, and scope. Please note that at least 1 (One) project must be a government project; at least 1 (One) project must have a completed successful delivery of minimum budget of \$300M - private or government; at least 1 (One) project must show experience working on a similar scope project. |
| | | Proposed Staff Team and | 20 | Minimum 10 points | The Supplier must provide a list of key staff proposed for |

Negotiated Request for Proposals – Doc5587239263
Part 4 – Form B - Technical Proposal and Qualifications

| | | | | | |
|--|--|---|----|------|--|
| | | Resources - 2 separate sets dedicated for each GSR and 4610 Finch projects. | | | the project, including their qualifications, relevant experience, and defined roles and responsibilities. The submission should also outline strategies and personnel available to address unforeseen staffing changes. Resumes for all proposed team members must be attached, and the Supplier must include a statement disclosing any conflicts of interest, in accordance with the Supplier Code of Conduct. |
| | | Work Plan and Deliverables | 15 | None | Strategic Plan & Methodology Overview, Project Phases & Activity Breakdown, Responsibilities & Capabilities, Work Plan & Timeline, Risk Management & Quality Assurance, Sustainability & Innovation, Tools, Systems & Technologies, Cost Estimation & Value Engineering, Regulatory Knowledge, Quality Assurance & Issue Management, Stakeholder Communication, Health & Safety Commitment, Lessons learned, and Additional Services |
| | | Resource Management Plan | 15 | None | The Supplier's Resource Management Plan outlines a clear strategy for allocating, coordinating, and overseeing project personnel to ensure timely and effective delivery. It identifies key team members, their roles, responsibilities, and availability, along with processes for workload balancing, communication, and performance monitoring. The plan also |

Negotiated Request for Proposals – Doc5587239263
Part 4 – Form B - Technical Proposal and Qualifications

| | | | | | |
|---|---------------------------|--------------------------------------|----------------------------------|--------------------------|--|
| | | | | | includes contingency measures to address unexpected staffing changes, ensuring continuity and minimizing project risk through documented backup resources and defined escalation procedures. |
| | | Key Performance Indicators (KPI) | 15 | None | Proponents must ensure that their submissions clearly demonstrate how each deliverable aligns with and supports the achievement of these KPIs. Compliance with the KPI Matrix will be a critical component of performance evaluation throughout the project lifecycle. |
| Stage 2 | Subtotal | Total Stage 2 Points | 100 | Minimum 75 points | Threshold to proceed to Stage 3 |
| Stage 2C | Interviews | | Re-evaluation of Stage 2B | None | |
| The top three (3) highest scoring suppliers will be moved to Stage 3. *Minimum threshold may be modified until up to three (3) suppliers can move to the next stage – Stage 3. | | | | | |
| Stage 3 | Financial Analysis | Cost & Value-for-Money | 100 | None | |
| Stage 4 | Contract Award | Final Negotiation & Award | N/A | N/A | Based on cumulative score and negotiation |

PLEASE NOTE: For total evaluation, Stage 2B Technical Evaluation will be worth 60% of the final evaluation score and Stage 3 Pricing will be 40% of the final evaluation score. Each score listed in Table 1 above will be prorated accordingly.

3.2 SCORING SCALE TABLE

The following scoring scale that will be utilized to evaluate Supplier's response to each technical question. The score will then be prorated against the weighting to obtain points for each question and subsection.

| Scoring Factor | Rating | Detailed Description |
|-----------------------|---------------|-----------------------------|
|-----------------------|---------------|-----------------------------|

Negotiated Request for Proposals – Doc5587239263
Part 4 – Form B - Technical Proposal and Qualifications

| | | |
|----|---------------------------|--|
| 10 | Excellent | Response fully <u>meets all</u> of the City's requirements with the highest degree of confidence in the Supplier's response or proposed solution <u>AND exceeds</u> the requirements in providing a superior response or proposed solution. |
| 9 | Very Good | Response <u>meets all</u> of the City's major requirements and <u>nearly all minor</u> requirements with the highest degree of confidence in the Supplier's response or proposed solution. There are small areas where improvements or refinements could be made. |
| 8 | Good | Response <u>meets all</u> of the City's major requirements <u>most major</u> requirements, however, some minor elements are <u>incomplete, inconsistent, or under-developed</u> . These deficiencies are limited to minor areas and do not compromise the ability to achieve the required outcomes. |
| 7 | Fair/Satisfactory | Response <u>fully meets all</u> major requirements, but <u>some minor requirements are not addressed</u> . The response is acceptable overall, demonstrating sufficient capability to deliver, though there are <u>areas for improvement in minor requirements</u> . |
| 6 | Somewhat Satisfactory | Response <u>meets most but not</u> all major requirements. One or more major requirements are missing or weak, reducing confidence in delivery. Minor requirements are generally addressed but cannot compensate for the gaps in major areas. |
| 5 | Minimally Satisfactory | Response meets <u>only some major requirements</u> , with <u>notable gaps or misunderstandings of scope</u> . Provides limited relevant information, and while a few components are adequately covered, several major and minor requirements remain incomplete or deficient. |
| 4 | Unsatisfactory/Inadequate | Response <u>meets some major requirements</u> are partially met, but others are significantly lacking. A few minor requirements may be addressed, but most are deficient. Limited confidence in delivery. |
| 3 | Weak | Response <u>minimally meets requirements</u> with <u>significant deficiencies</u> in most major and minor requirements, with only partial or a small portion of a few requirements are met. |
| 2 | Poor | The response <u>addresses the requirements</u> but <u>significantly fails to meet</u> the requirements. |
| 1 | Very Poor | A response <u>does not address</u> any of the requirements. |