

## **PROPOSAL EVALUATION PLAN**

### **GTH Management Services Provider RFP**

#### **Introduction**

This Request for Proposals (the RFP) is an invitation by the Global Transportation Hub (GTH) to prospective proponents to submit proposals to assume the marketing & sales, property management, and land development functions of the GTH, an 1800-acre inland port. These responsibilities are further described in Appendix A as The Deliverables.

The GTH is an entity of the Government of Saskatchewan responsible for the development, operation and regulation of the lands within its footprint. While the primary functions of development and operation will be outsourced, the regulatory function would continue to be delivered by the Provincial Government.

This document sets out the methodology that will be followed to evaluate responses to the RFP and identify a limited number of ranked proponents to enter into concurrent negotiations.

#### **Objectives of the Evaluation Methodology**

The methodology will help ensure that the evaluation process is transparent and robust, and that the best possible decision is made. The objectives of this document are to:

- Confirm the members of the Evaluation Team.
- Document the RFP evaluation method.
- Summarize the timelines and deliverables related to the RFP process.
- Document the approach for Evaluation Team members to use in order to fairly and equitably evaluate responses.
- Provide formal documentation of the evaluation process and the evaluation criteria.

#### **Fairness Advisor and Observer**

To ensure the procurement process follows accepted standards and is fair to both the GTH and proponents, MNP LLP (MNP) has been retained as a fairness advisor and observer.

#### **Conflict of Interest**

All individuals involved in the evaluation of RFP responses must declare any existing or potential conflicts of interest before taking part in the evaluation process.

#### **Confidentiality**

Through all phases of the evaluation, the confidentiality and security of proposals and the scoring process must be maintained. The evaluators shall not discuss the contents of submitted proposals, the evaluation process or evaluation results with any persons not supporting the Evaluation Team or outside of formal meetings of the Evaluation Team. All members of the Team should sign a Conflict of Interest and Confidentiality Declaration (separate attachment) prior to receiving the RFPs for evaluation.

### Receipt of RFP responses

All proposals must be submitted in accordance with the RFP to the Acting President and CEO who will confirm that the proposals were received before the RFP closing date and time.

### Proposal Eligibility

The Acting President and CEO will do an initial review of the proposals for eligibility/meeting the Mandatory Submission Requirements. The Evaluation Team Chair will also review the responses for eligibility.

### Evaluation Team

The Evaluation Committee will read the RFP responses individually, determine an overall ranking of responses, and convene to make a decision regarding which proponent should be selected to enter into concurrent negotiations.

### Evaluation Committee:

- Nithi Govindasamy - Chair
- Rod Balkwill
- Cindy Ogilvie
- Greg Lusk
- Terry Baker
- Lionel LaBelle
- Doug Moen
- Matt Schroeder\*\*

### Evaluation Timetable

Individual evaluation scoring will be completed between April 22, 2019, upon receiving the proposals, and April 25, 2019 prior to the Evaluation Committee

**\*\*Evaluation team to electronically submit their scoring matrix to the Evaluation Committee Chair, Nithi Govindasamy and Board Secretary, Kandace Monastyrski by 10:00 a.m. April 25, 2019, so the scores can be entered in time for the afternoon evaluation meeting.\*\***

### RFP Timetable:

|   |                             |
|---|-----------------------------|
| Issue Date of RFP   | March 6, 2019               |
| Onsite Presentation and Tour (Optional)                                       | March 20, 2019              |
| Deadline for Questions and Requests for Conference Calls                      | March 27, 2019              |
| Deadline for Issuing Addenda  | April 11, 2019              |
| Submission Deadline   | April 22, 2019, 3:00 PM CST |
| Shortlisted Proponents will be invited to move onto next phase of procurement | May 1, 2019                 |
| Deadline for non-disclosure agreements to be signed by shortlisted proponents | May 7, 2019                 |

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|   |                       |
|---|-----------------------|
| Additional information provided to proponents                         | May 8, 2019           |
| Anticipated Deadline for Submission of Best and Final Offers (“BAFO”) | June 12, 2019         |
| Presentations by shortlisted proponents to evaluation Committee       | Week of June 17, 2019 |
| Anticipated Final Ranking   | June 26, 2019         |
| Contract Negotiation Period   | TBD                   |
| Anticipated Execution of Agreement                                    | TBD                   |

The RFP timetable is tentative only and may be changed by the GTH at any time.

### Evaluation criteria and weighting

The evaluation criteria and weighting of each category is outlined in the RFP. For ease of reference, it is reproduced below:

| <b>Request for Proposal Evaluation Criteria</b> | <b>Score out of</b> | <b>Score</b> |
|---|---------------------|--------------|
|---|---------------------|--------------|

| <b>Proponent or Consortium Profile</b>                 |           |  |
|--|-----------|--|
| Innovative and creative approaches focused on outcomes | 10        |  |
| Qualifications and experience of proposed resources    | 15        |  |
| References   | 15        |  |
| <b>Proponent or Consortium Profile Total</b>           | <b>40</b> |  |

| <b>Marketing &amp; Sales</b>   |           |  |
|--|-----------|--|
| Strategic vision for economic growth                                   | 10        |  |
| Action plan for land sales and revenue generation                      | 10        |  |
| Access and plan to leverage local, national and international networks | 7         |  |
| Qualifications to undertake this service                               | 5         |  |
| Outline of prior experience with similar developments                  | 8         |  |
| Proposed costing structure and estimate of costs                       | 10        |  |
| <b>Marketing &amp; Sales Total</b>                                     | <b>50</b> |  |

| <b>Property Management</b>                            |           |  |
|---|-----------|--|
| Vision/approach to successful management              | 8         |  |
| Qualifications to undertake this service              | 5         |  |
| Outline of prior experience with similar developments | 7         |  |
| Proposed costing structure and estimate of costs      | 10        |  |
| <b>Property Management Total</b>                      | <b>30</b> |  |

| <b>Land Development</b>                               |           |  |
|---|-----------|--|
| Plan for effective delivery of service                | 5         |  |
| Qualifications to undertake this service              | 5         |  |
| Outline of prior experience with similar developments | 5         |  |
| Proposed costing structure and estimate of costs      | 5         |  |
| <b>Land Development Total</b>                         | <b>20</b> |  |

|                      |            |  |
|----------------------|------------|--|
| <b>Overall Score</b> | <b>140</b> |  |
|----------------------|------------|--|

## Evaluation Guide

Each Evaluation Committee Member is to personally evaluate each proposal using the evaluation criteria below. A separate Evaluation Guide template (see attached) has been prepared for evaluators to document their scoring and supporting rationale.

| Proponent or Consortium Profile  | Weightings | Weak  | Below Average  | Average  | Above Average  | Exceptional   |
|--|------------|---|--|--|--|---|
| Innovative and creative approaches focused on outcomes                 | 10         | - Did not present any innovative approaches<br><b>(1 POINT)</b>   | - Limited innovative approaches<br><b>(3 POINTS)</b>   | - Some innovative approaches but not overly creative<br><b>(6 POINTS)</b>  | - Innovative approaches are thoughtful and creative<br><b>(8 POINTS)</b>   | - Incorporates innovation into a compelling proposed path forward<br><b>(10 POINTS)</b>   |
| Qualifications and experience of proposed resources                    | 15         | - Proposed team members do not have any relevant qualifications<br><b>(1 POINT)</b>                                     | - Proposed team members possess some but not all relevant qualifications and experience<br><b>(4 POINTS)</b>   | - Proposed team members have sufficient relevant qualifications and experience<br><b>(8 POINTS)</b>  | - Proposed team members are highly qualified and experienced<br><b>(12 POINTS)</b>   | - Proposed team members are considered subject matter experts<br><b>(15 POINTS)</b>   |
| References   | 15         | - Sample projects missing or not related to the project needs<br><b>(1 POINT)</b>                                       | - Sample projects have limited relation to the project's needs<br><b>(4 POINTS)</b>  | - Sample projects generally relate to the project's needs<br><b>(8 POINTS)</b>   | - Sample projects generally have solid relation to the project's needs<br><b>(12 POINTS)</b>   | - Sample projects directly relate to this project's needs and demonstrate competency in each category (property management, sales & marketing, and land development)<br><b>(15 POINTS)</b>                  |
| <b>TOTAL</b>   | <b>40</b>  |   |  |  |  |   |
| <b>Marketing and Sales</b>   |            |   |  |  |  |   |
| Strategic vision for economic growth                                   | 10         | - Does not demonstrate an understanding of GTH or communicate vision<br><b>(1 POINT)</b>                                | - Demonstrates limited understanding of GTH and vision<br><b>(3 POINTS)</b>  | - Communicates a reasonable vision and approach to marketing and sales<br><b>(6 POINTS)</b>  | - Communicates a thoughtful vision and approach to marketing and sales<br><b>(8 POINTS)</b>  | - Communicates a compelling vision for the future of the GTH related to marketing and sales<br><b>(10 POINTS)</b>   |
| Action plan for land sales and revenue generation                      | 10         | - Does not provide an action plan with respect to marketing and sales<br><b>(1 POINT)</b>                               | - Communicates action plan with significant gaps or deficiencies to generate land sales<br><b>(3 POINTS)</b>   | - Communicates a reasonable action plan of steps to be taken to generate land sales<br><b>(6 POINTS)</b>   | - Communicates a thoughtful action plan to be taken to generate land sales<br><b>(8 POINTS)</b>  | - Communicates a compelling, realistic action plan that addressed key risks and also understands the current environment of the GTH<br><b>(10 POINTS)</b>   |
| Access and plan to leverage local, national and international networks | 7          | - Description of network of contracts or approach to marketing and sales is not present<br><b>(1 POINT)</b>             | N/A  | - Sufficient network and approach to marketing and sales<br><b>(4 POINTS)</b>  | N/A  | - Advanced network and compelling approach to marketing and sales<br><b>(7 POINTS)</b>  |
| Qualifications to undertake this service                               | 5          | - Proponent lacks qualifications related to marketing and sales of GTH land<br><b>(1 POINT)</b>                         | N/A  | - Proponent possess adequate qualifications related to marketing and sales of GTH land<br><b>(3 POINTS)</b>                                      | N/A  | - Proponent is highly qualified with respect to marketing and sales of GTH land<br><b>(5 POINTS)</b>  |
| Outline of prior experience with similar developments                  | 8          | - Proponent does not have any relevant experience related to the marketing and sale of similar land<br><b>(1 POINT)</b> | N/A  | - Proponent has sufficient relevant experience related to the marketing and sale of similar land<br><b>(4 POINTS)</b>                            | N/A  | - Proponent has extensive relevant experience related to the marketing and sale of similar land<br><b>(8 POINTS)</b>  |
| Proposed costing structure and estimate of costs                       | 10         | - Is not provided or proposed costing for marketing and sales is clearly not financially feasible<br><b>(1 POINT)</b>   | - Costing for marketing and sales is provided however presents significant gaps and deficiencies that question that financial viability<br><b>(3 POINTS)</b> | - A reasonable costing structure is provided that clearly outlines how compensation for marketing and sales will take place<br><b>(6 POINTS)</b> | - Costing structure is thorough and provides confidence that it will be financially sustainable and publicly defensible<br><b>(8 POINTS)</b> | - Costing structure for marketing and sales is realistic, compelling, linked to key goals, and clearly demonstrates financial sustainability, responsibility and public defensibility<br><b>(10 POINTS)</b> |
| <b>TOTAL</b>   | <b>50</b>  |   |  |  |  |   |

## Proposal Evaluation Plan

|   |            |   |  |  |  |   |
|---|------------|---|--|--|--|---|
| <b>Property Management</b>                            |            |   |  |  |  |   |
| Vision/Approach to successful management              | 8          | - Does not demonstrate an understanding of GTH or communicate vision related to provision of municipal services<br><b>(1 POINT)</b>     | N/A  | - Communicates a vision and feasible approach to property management and delivery of municipal services<br><b>(4 POINTS)</b>                         | N/A  | - Communicates a compelling vision for the future of the GTH related to property management supported by a compelling approach to execution<br><b>(8 POINTS)</b>  |
| Qualifications to undertake this service              | 5          | - Proponent lacks qualifications related to property management and delivery of municipal services<br><b>(1 POINT)</b>                  | N/A  | - Proponent possesses adequate qualifications related to property management and delivery of municipal services<br><b>(3 POINTS)</b>                 | N/A  | - Proponent is highly qualified with respect to property management and delivery of municipal services<br><b>(5 POINTS)</b>   |
| Outline of prior experience with similar developments | 7          | - Proponent does not have any relevant experience related to property management and delivery of municipal services<br><b>(1 POINT)</b> | N/A  | - Proponent has sufficient experience related to property management and delivery of municipal services<br><b>(4 POINTS)</b>                         | N/A  | - Proponent has extensive relevant experience related to property management and delivery of municipal services<br><b>(8 POINTS)</b>  |
| Proposed costing structure and estimate of costs      | 10         | - Is not provided or proposed costing for property management is clearly not financially feasible<br><b>(1 POINT)</b>                   | - Costing for property management is provided however presents significant gaps and deficiencies that question that financial viability<br><b>(3 POINTS)</b> | - A reasonable costing structure is provided that clearly outlines how compensation for property management will take place<br><b>(6 POINTS)</b>     | - Costing structure is thorough and provides confidence that it will be financially sustainable and publicly defensible<br><b>(8 POINTS)</b> | - Costing structure for property management is realistic, compelling, linked to key goals, and clearly demonstrates financial sustainability, responsibility and public defensibility<br><b>(10 POINTS)</b> |
| <b>TOTAL</b>  | <b>30</b>  |   |  |  |  |   |
| <b>Land Development</b>                               |            |   |  |  |  |   |
| Plan for effective delivery of service                | 5          | - Does not provide an action plan with respect to land development<br><b>(1 POINT)</b>  | N/A  | - Communicates a clear action plan of steps to be taken for land development<br><b>(3 POINTS)</b>  | N/A  | - Communicates a compelling, realistic action plan for effective delivery of services related to land development<br><b>(5 POINTS)</b>  |
| Qualifications to undertake this service              | 5          | - Proponent lacks qualifications related to land development<br><b>(1 POINT)</b>  | N/A  | - Proponent possesses adequate qualifications related to land development<br><b>(3 POINTS)</b>   | N/A  | - Proponent is highly qualified in land development<br><b>(5 POINTS)</b>  |
| Outline of prior experience with similar developments | 5          | - Proponent does not have any relevant experience in land development of a similar nature<br><b>(1 POINT)</b>                           | N/A  | - Proponent has sufficient relevant experience in land development<br><b>(3 POINTS)</b>  | N/A  | - Proponent has extensive experience in land development and has demonstrated success in similar projects<br><b>(5 POINTS)</b>  |
| Proposed costing structure and estimate of costs      | 5          | - Is not provided or proposed structure for land development is clearly not financially feasible<br><b>(1 POINT)</b>                    | N/A  | - A reasonable costing structure is provided that clearly outlines how compensation for and development of land will take place<br><b>(3 POINTS)</b> | N/A  | - Costing structure for land development is realistic, compelling, linked to key goals, and clearly demonstrates financial stability, responsibility, and public defensibility<br><b>(5 POINTS)</b>         |
| <b>TOTAL</b>  | <b>20</b>  |   |  |  |  |   |
| <b>GRAND TOTAL</b>                                    | <b>140</b> |   |  |  |  |   |

## Evaluation Process

### **Stages of Evaluation and Negotiation**

- The GTH will conduct the evaluation of proposals and negotiations in the following stages:

#### **Stage I – Mandatory Requirements:**

- Stage I is expected to consist of a review to determine which proposals comply with the mandatory requirements. If a proposal fails to satisfy any mandatory requirement, the GTH may choose, in its sole discretion, to not evaluate the proposal further. The mandatory requirements are detailed in *Appendix A of RFP Particulars*
- Submission Form (*Appendix D of RFP Particulars*)
  - Each proposal should include a Submission Form, or a document containing the information requested, completed and signed by an authorized representative of the proponent.

#### **Stage II – Evaluation:**

- The GTH will evaluate each qualified proposal using the rated criteria as set out in *Section D of the RFP Particulars (Appendix A)*, and the pricing particulars discussed in Section E of the *RFP Particulars (Appendix A) and the Pricing Form (Appendix B)*.
- Pricing Form (*Appendix B of RFP Particulars*)
  - Each proposal should include a Pricing Form (*Appendix B of RFP Particulars*), or a document containing the information requested, completed in accordance with the instructions contained in the form.

#### **Stage III – Concurrent Negotiations and BAFO**

- Initial Ranking of Proponents
  - After the completion of Stage II, all scores from previous stages will be added together and the proponents will be ranked based on their total scores.
- Concurrent Negotiations and BAFO Process
  - The GTH intends to invite a limited number of ranked proponents to enter into concurrent negotiations. During these concurrent negotiations, the GTH may provide each proponent with additional information and may seek further information and proposal improvements. After the expiration of the concurrent negotiation period, each proponent will be invited to revise its initial proposal and submit its Best and Final Offer (BAFO) to the GTH. The purpose of the BAFO process is to provide the opportunity for two-way, open dialogue to refine proponent's bids to best suit the needs of the GTH and provide best overall value to taxpayers. The GTH will provide additional information and instructions to bidders at the outset of the BAFO process. It is anticipated that some details provided at the BAFO stage will be applicable to all proponents, while other details may be specific to each individual proponent and their specific bids.

- Evaluation of BAFO and Final Ranking of Proponents
  - Each BAFO will be evaluated by a committee against the criteria that will be confirmed with those proponents that are invited to the BAFO stage. The top-ranked proponents based on the evaluation of the BAFOs will receive a written invitation to enter into a final round of negotiations to finalize the agreement with the GTH.

## Debriefs

- Notification to Other Proponents
  - Once an agreement is signed by the GTH with the successful proponent, the other proponents will be notified directly by the GTH. The GTH will communicate with proponents at key milestones to ensure they are apprised of overall progress.
- Debriefing
  - Proponents who submitted a proposal may request a debriefing after receipt of a notification of the outcome of the procurement process. All requests must be in writing to the RFP Contact and must be made within thirty (30) days of notification of the outcome of the procurement process. The intent of the debriefing information session is to aid the proponent in presenting an improved proposal in subsequent procurement opportunities. Any debriefing provided is not for the purpose of providing an opportunity to challenge the procurement process or its outcome.