

About this template: This document will form the core details of your procurement. By providing detailed information about what your business needs are and how proponents should present their solutions and costs, you are equipping the marketplace with the information they need to provide quality submissions that can be easily and fairly evaluated. This will directly improve your ability to select the right vendor for your project.

APPENDIX C – IESO INFORMATION & REQUIREMENTS

SECTION 1 – OVERVIEW

1.1 Context

****[Instructions:** Include background information in a clear and concise statement that explains what you are buying to provide context to the Proponents about this specific need for this product/service. Include a brief description and overall scope of work and contract timeframe, including any extensions]**

[Enter Text Here]

[End of Section 1]

SECTION 2 – DELIVERABLES

****[NOTE:** this section will form the content of the resulting contract for this procurement]**

2.1 Objective(s)

****Instructions:** Objectives are well-defined statements of the results to be achieved in order for the overall mission of the work to be accomplished. They should be specific, measurable, realistic and time-specific. For example:

“Develop an excel based tool to evaluate, measure and verify X, Y and Z” or

“Develop, mail, analyze and present results from a survey of 10,000 residences to measure the perception of electricity conservation in Ontario”

*Delete these instructions before submitting to Procurement***

[Enter Text Here]

2.2 Requirements/Tasks

****[NTD:** The heading of this section may be amended or altered to meet your specific procurement requirements. Examples include “Scope of Work”, “Specifications”, etc.]

Instructions: Detail the activities and milestones that need to be completed to accomplish the contract objectives. These can be structured by milestones, deliverables, or processes. Consider the following:

- A clear description of what the vendor is responsible for delivering and how they should deliver it;
- Clear instructions on how the IESO will determine if the deliverables are acceptable;
- Identification of the specific approach or methodology of each task, as required;
- Identification of any documentation that must be followed or used as guidelines, as required;
- Identification of any deliverables, such as reports or presentations, that will result from the tasks, the IESO’s approval requirements of those deliverables, and any specific content that should be addressed;
- Any IESO support offered to the vendor, i.e. equipment, staff, software, as applicable; and
- A clear description of any specific equipment or software compatibility requirements

Delete these instructions before submitting to Procurement**

2.2.1 Task 1 – Provide detailed instructions about each Task.

2.2.2 Task 2

2.2.2.1 Sub-task instruction

2.2.3 Task 3

2.2.3.1 Sub-task instruction

2.3 Timelines

****Instructions:** Include the schedule of delivery of tasks/milestones. Timelines should be reasonable and should include consideration for the timing of the procurement and contracting. Examples may include any of the following types of instructions:

Task/Deliverable/Milestone	Estimated Timeline
Delivery of Report #1	2 weeks following the execution of contract
Phase 1 of the Project	3 months following the execution of contract

*Delete these instructions before submitting to Procurement***

[Enter Text & Table]

[End of Section 2]

2.4 Material Disclosures

****Instructions:** Disclose information that is material to the contract and could affect the Proponents' decision to submit a Proposal or the Proponent's pricing information. Some suggestions include:

- Anticipated quantities: eg. A high volume that may be unreasonable for some to deliver, or volumes that will impact how price is calculated. Where available, historical volumes should be provided.
- Performance timeframes: eg. A strict timeline that may be difficult to meet due to capacity or resource constraints
- Performance warranties: eg. Labour & Material warranties, manufacturer's warranty, etc.
- Traveling requirements: If travel is required between the IESO's offices or is required as part of the service (eg. Conducting on-site audits at LDC locations, travelling for meetings to northern communities, etc.);
- Hosting/storage/processing of information within Canada;

*Delete these instructions before submitting to Procurement***

2.4.1 Material Disclosure #1

[Enter Text Here]

2.4.2 Material Disclosure #2

[Enter Text Here]

SECTION 3 PROPOSAL CONTENT AND RATED CRITERIA

****Instructions:** Only the criteria set out in the Procurement Document may be used to evaluate submissions, so it's important that criteria is clearly established with the weightings early on.

3.1 Mandatory Criteria: [NTD: DELETE IF NOT REQUIRED]

***Mandatory Criteria:** Any “Mandatory Criteria” should be discussed with your Procurement Specialist. Mandatory criteria should be highly limited and must only be identified on a pass/fail basis.*

The following must be submitted with your Proposal, in accordance with the instructions provided under PART 4.3iii) of this RFP. Failure to submit any of the following mandatory criteria may result in the disqualification of your Proposal.

3.1.1 [Enter Mandatory Criteria Here]

3.2 Rated Criteria

***Rated Criteria:** While some examples have been provided below, you should consider the following in determining the most appropriate evaluation criteria:*

- *What experience does the Proponent have to provide to demonstrate their ability to deliver this project?*
- *Carefully consider whether direct experience in the energy sector is relevant to the ability of the Proponent to successfully complete the project. If specific sector experience is not critical then it should not necessarily be included.*
- *Is there a need to see samples, case studies, portfolios, or other examples of work to determine the capabilities of the Proponent?*
- *What certifications, accreditations or other qualifications are required or would be considered an asset?*
- *Have you provided enough information in the scope that the Proponent can prepare a project plan, schedule or other project specific methodologies and approaches?*
- *Do you expect to conduct interviews or demonstrations?*
- *Will you require submissions to meet a minimum technical score before evaluating price? If so, what is that threshold?*
- *How will pricing be evaluated? Time and materials, fixed fee, or other? A pricing matrix (in a table format) must be included in the Procurement Document to ensure that an accurate comparison can be made between the Proponents submissions.*

Complete the table below.** For each Rated Criteria Category, provide a weighting in the table and a description in the below section of what information is to be provided for consideration.

Rated Criteria Category	Weighting (Points)	Minimum Threshold

Phase II of Evaluation:		
Experience, Skills & Qualifications		
Understanding of Deliverables		
Project Plan		
Total Points [for Phase II of Evaluation]:	70 points	
Phase III of Evaluation: Pricing	30 Points	
Phase IV of Evaluation: Interview & Presentation (refer to 3.5 of this Section)		
Total Overall Points:		

***Note: Business Units should adjust and amend the table as necessary to align with the Rated Criteria that will be used.*

Sample Evaluation Criteria Language

3.2.1 Experience, Skills and Qualifications

(X) Points

Each Proponent should provide the following in its proposal:

- (a) a brief description of the proponent, including any subcontractors it intends to use;
- (b) a description of the goods and services the proponent has previously and/or is currently delivering, with an emphasis on experience relevant to the Deliverables as outlined in Appendix C – Section 2, Deliverables;
- (c) the roles and responsibilities of the proponent and any of its agents, employees and subcontractors who will be involved in providing the Deliverables, together with the identity of those who will be performing those roles and their relevant respective expertise, including backup for key roles;
- (d) its knowledge, skills and expertise in providing the Deliverables as outlined in this RFP to companies and other organization of a similar size and industry.
- (e) a Reference Form in accordance with the instructions set out in Appendix B – Reference Form.

3.2.2 Understanding of Deliverables

(X) Points

Each Proponent should provide the following in its proposal:

- A description of the Proponent's overall approach to the Deliverables;
- Details which indicate an understanding of the scope, size and complexity of the Deliverables.

3.2.3 Project Plan

(X) Points

Each Proponent should provide the following in its proposal:

- A description of how the Proponent will provide the required Deliverables;
- The proposed schedule for delivery of the Deliverables (Gantt chart), management of the work, delegation of responsibility (tasks and assigned persons), work plans, cost control, reporting and quality control and subcontracting arrangements.

3.2.4 Evaluation of Pricing

Proponents should review and complete the Pricing Forms as outlined in Appendix D.

The IESO will not pay or reimburse any hospitality, incidental or food expenses; such items should not be included in pricing submissions. The IESO will not be responsible for any travel or accommodation expenses incurred by the Service Provider that are not pre-approved in writing by the IESO and charged in accordance with *Management Board of Cabinet's Travel, Meal and Hospitality Expenses Directive*, as may be amended or replaced from time to time

Total Points

(X) Points

***Note that the following is provided as a sample only and will be amended based on the chosen price methodology. This description represents the typical criteria for a lump-sum price model.*

Each Proponent will receive a percentage of the total possible points allocated to price for the particular category, as calculated by the following formula:

lowest Proposal price/Proponent Proposal price = %

For example, if the lowest price from a Proponent in a particular category is \$120, it receives 100% of the points (120/120 = 100%); a Proponent whose price is \$150.00 receives 80% of the possible points for that category (120/150 = 80%) and a Proponent whose price is \$240.00 receives 50% of the possible points for that category (120/240 = 50%).

3.2.5 Interview and Presentation [NTD – Delete If Not Required]

(X) Points

Proponents whose proposal submissions have received the highest overall scores for Phase II and Phase III of the Evaluation may be invited to an interview and presentation.

Presentations should be no more than (x) minutes in length. A further (x) minutes will be allocated to the interview.

Proponents should be prepared to complete a presentation during the week of [DATE] (subject to change, as necessary, by the IESO).

[END OF APPENDIX C]

APPENDIX D – PRICING FORM

*****Instructions:** Identify the pricing methodology to be used. The method for pricing should be relevant to the project, Deliverables and the information you have outlined in your requirements. Common methods have been provided below however, alternative strategies may be developed with your Procurement Specialist.*

☐ Lump Sum Pricing: Use when the project is well defined and has a specific scope of work and timelines. May be disclosed as a single value (an “all-in” price) or may include a breakdown by milestone or deliverable.

☐ Unit Rates: Use when the project is well defined and has a specific scope of work and timelines. Best used when specific quantities are estimated and may need to be increased or decreased (e.g. # of training sessions, # of hardware pieces, etc.)

☐ Blended Hourly Rates: Use when the project is mostly defined, but the scope of work, specific Deliverables, or timelines may be variable. A blended hourly rate includes a distribution of work effort across project team members (for example: the proponent anticipates distributing the work as follows:

Role	% of Effort
Subject Matter Expert	50%
Project Sponsor	5%
Analysts	45%

☐ Average Hourly Rates: Use when the project is less defined and the scope, specific Deliverables and timelines are variable. Also use when work will be requested on an ad-hoc or as-needed basis.

☐ Other: Other options may be considered. Please provide details of the proposed approach for further discussion with your Procurement Specialist.