**EVALUATION CRITERIA**

|  |
| --- |
| **TEMPLATE**  **INSTRUCTIONS**  **IMPORTANT**: The criteria listed below are only intended to provide a format if that type of criteria would be relevant to your requirement. In practice, you should have a small number of criteria centering mostly around numbers of years or projects of experience in one or more specific area and a few example projects. Additionally evaluating education, language, references, methodology, work plans, understanding, etc. have pros and cons that should be discussed with your contracting officer.   1. Determine which competencies bidders should demonstrate to give you confidence in their ability to perform the work; 2. Select which of type of criteria can best demonstrate those competencies; 3. Replace text that is red and/or underlined with text that is appropriate to your requirement; 4. Confirm and/or replace text that is blue based on your requirement and/or preferences; 5. Adapt placeholder text (black) to make the wording more appropriate to your requirement, if need be; 6. Add scores to the Resource point rated criteria in proportion to how important each criteria is to the bidder’s ability to perform the work; 7. Add additional criteria, based on the structure shown, if need be; 8. Delete criteria that are less relevant to your requirement or are less effective approaches to ascertain competence; 9. Review the Evaluation Criteria for completeness and accuracy (*including the title in the footer*) 10. Select the entire document, convert the text to black colour, and remove underlining; and 11. Make sure the document formatting is ok (*e.g. the requirement numbering is sequential and this instruction box is deleted*). |

# BASIS OF SELECTION

1.1 To be declared responsive, a bid must:

(a) comply with all the administrative requirements (*identified in this bid solicitation document*);

(b) meet all of the mandatory technical criteria (*identified in section 2 below*);

(c) obtain the required minimum points overall for the point-rated technical criteria (*identified in section 3 below*).

1.2 The responsive bid with the highest combined technical merit and price (xx% technical merit and xx% price) will be recommended for contract award.

1. **MANDATORY TECHNICAL CRITERIA**

2.1 The bid must satisfy all of the mandatory technical criteria specified below to be deemed responsive.

2.2 The Bidder must provide documented substantiation that sufficiently supports claims of compliance with each criterion. Each criterion should be addressed separately.

|  |  |
| --- | --- |
| **M1** | **Experience with delivering change management services**  The Bidder must demonstrate that the proposed Resource has at least 10 years/projects of relevant experience delivering change management strategies and/or plans within the past 15 years. This experience could have been obtained either in the public or private industry.  *Submit Form A at section 4.2: “Summary Listing of the Experience of Proposed Resource” to substantiate response to this criterion. List only projects that comply with this criterion* |
| **M2** | **Experience with playing a key role\* in a change management initiative in the public sector relating to workplace transformation**  The Bidder must demonstrate that the proposed Resource has experience with playing a **key role\*** in a change management initiative in the public sector relating to Workplace Transformation in these fields:   * Accommodations/Relocation * Information Management * Information Technology * Human Resources   The Bidder must demonstrate that the proposed Resource has at least 1 project of relevant experience in Accommodation/Relocation and 1 project of relevant experience in 1 of the 3 remaining listed fields above within the past 10 years.  **\*key role** is defined as ‘to be involved in a way that has a significant impact on the initiative’ for example, team leader, project manager, change manager, etc.  *Submit Form A at section 4.2: “Summary Listing of the Experience of Proposed Resource” to substantiate response to this criterion. List only projects that comply with this criterion* |
| **M3** | **Education**  The Bidder must demonstrate that the proposed Resource has a university degree from a recognized university in a discipline that is relevant to change management. |
| **M4** | **Language**  The Bidder must attest that the proposed resource is able to speak, read and write English and/or French at the level of proficiency normally referred to in Government as a CBC (Advanced comprehension, Intermediate writing, Advanced oral)  *Bidders must refer to the Language Grid provided at Appendix A* |

1. **RATED TECHNICAL CRITERIA**

3.1 Bids that satisfy all of the mandatory technical criteria specified above will be further evaluated and scored in accordance with the point rated technical criteria specified below.

3.2 A bid must obtain an overall score totalling at least xx % of the maximum points possible for all of the point-rated technical criteria specified below to be deemed responsive.

3.3 The Bidder must provide documented substantiation that sufficiently supports claims of compliance with each criterion.

|  |  |
| --- | --- |
| **R1** | **Experience with senior executive engagement** *(maximum* ***20*** *points)*  The Bidder should demonstrate that the proposed Resource has more than ten (10) years of relevant experience providing advice and guidance to senior management\* on change resistance, culture change or workplace transformation in the public or private industry within the past twenty-five (25) years.  **Scoring**:  >10-13 years = 10 points  >13-16 years = 15 points  >16-20+ years = 20 points  *\*Senior Executive is defined as a position within an organization who holds the top-ranks within the organization’s authority and accountability structure.*   * *For the purposes of this RFP, within the public sector, Senior Executive may include: Deputy Minister (DM), Associate Deputy Minister, Assistant Deputy Minister (ADM), Chief Information Officer (CIO), Chief Financial Officer (CFO) and other positions that are EX-01 (or equivalent) level or higher.*      * *In the private sector, the Senior Executive is either a member of or reports directly to the organization’s ownership, company officers or Board of Directors. Senior Executive may include: President, Vice President (VP), Chief Financial Officer, Chief Information Officer, Chief Operating Officer, Chief Executive Officer (CEO), Officer, Principal, or Partner.*   *Submit Form A at section 4.2: “Summary Listing of the Experience of the Proposed Resource” to substantiate response to this criterion. List only projects that comply with this criterion.* |
| **R3** | **Experience with XYZ** *(maximum ‘x’ points)*  The Bidder should demonstrate that the proposed Resource has more than ‘X’ years/projects of relevant experience providing XYZ services or producing XYZ deliverables within the past ‘Y’ years.  **Scoring:** ’X’ points will be awarded for each ‘X’ additional years/projects of relevant experience to a maximum of ‘Y’ years/projects.  *Submit Form A at section 4.1: “Summary Listing of the Experience of the Proposed Resource” to substantiate response to this criterion. List only projects that comply with this criterion* |
| **R4** | **Example Project(s)** *(maximum* ***40*** *points)*  The Bidder should describe two (2) Project(s) that demonstrate the proposed Resource’s relevant experience delivering projects of similar scope and nature to that described in “Annex A–Statement of Work” within the past 10 years, in which the established project goals were met.  **Scoring**: Up to **20** points will be awarded for each example project of relevant experience according to the following scale:   |  |  |  |  |  | | --- | --- | --- | --- | --- | | Points | Condition |  | Points | Condition | | 10 | The project is very similar1 to the SOW in terms of context, objective and work undertaken |  | 10 | The project is comparable to the SOW in terms of 4/4 of scope2, scale3, recency4 and role5 | | 8 | The project is generally similar to the SOW in terms of context, objective and work undertaken | + | 8 | The project is comparable to the SOW in terms of 3/4 of scope, scale, recency and role | | 6 | The project is somewhat similar to the SOW in terms of context, objective and work undertaken |  | 6 | The project is comparable to the SOW in terms of 2/4 of scope, scale, recency and role | | 0 | The project is not similar to the SOW in terms of context, objective and work undertaken |  | 0 | The project is comparable to the SOW in terms of <2 of scope, scale, recency and role |   Total = 100% of the maximum allocation of **40** points.  Definitions:   1. Similarity: the degree of comparability of the example project’s context, objective and work involved to the requirement outlined in the SOW. 2. Scope: the degree of comparability of the range of services provided by the proposed resource to the range of services required to perform the requirement outlined in the SOW. 3. Scale: the degree of comparability of the level of effort performed by the proposed resource to the effort estimated to perform the requirement outlined in the SOW. 4. Role: the degree to which the proposed resource acted as a subject matter expert and/or process specialist, lead the work involved in their contribution, and acted autonomously. 5. Recency: the closer to the present that the example project was performed within the past 10 years.   *Submit Form B at section 4.3 “Example Projects” to substantiate response to this criterion.* |
| **R5** | **Methodology** *(maximum* ***50*** *points)*  The Bidder should submit a high-level approach & methodology for performing the work.  **Scoring:** Up to **50**points will be awarded for the proposed approach & methodology according to the following scale:   |  |  | | --- | --- | | Points | Condition | | 50 | The methodology comprehensively addresses all aspects of the requirement, is deemed to effectively achieve the requirement’s objectives | | 35 | The methodology comprehensively addresses all aspects of the requirement, is deemed to be moderately effective in achieving the requirement’s objectives | | 25 | The methodology addresses only some aspects of the requirement, is deemed to be only somewhat effective in achieving the requirement’s objectives | | 0 | The methodology does not address key aspects of the requirement, is not deemed to be effective in achieving the requirement’s objectives |   Examples of criteria to be addressed in the methodology include, but are not limited to:   * Information sources and information collection methods; * Stakeholders that are proposed to be consulted and the approach to that consultation; * Approach(es) to information analysis; * Manner in which observations, analyses, findings, conclusions and recommendations will be presented; * Proposed roles, responsibilities and relations between project resources, etc.   *The response should not exceed two (2) pages in length.* |
| **R6** | **Work Plan** *(maximum* ***20*** *points)*  The Bidder should submit a high-level plan for performing the work.  **Scoring:** Up to **20**points will be awarded for the proposed work plan according to the following scale:   |  |  | | --- | --- | | Points | Condition | | 20 | The work plan comprehensively addresses all aspects of the work; the schedule respects deadlines and is realistic | | 15 | The work plan addresses all key aspects of the work; the schedule respects deadlines and is generally realistic | | 10 | The work plan addresses all only some aspects of the work; the schedule respects deadlines but is generally not realistic | | 0 | The work plan does not addresses key aspects of the work; the schedule does not respect deadlines or is not realistic |   . |
| **R7** | **Understanding** *(maximum* ***40*** *points)*  The Bidder should identify two (2) issues deemed the most significant obstacles to successfully achieving the requirement’s objective and a proposed means of resolution for each.  **Scoring:** Up to **20** points will be awarded for each identified issue and proposed strategy according to the following scale:   |  |  |  |  |  | | --- | --- | --- | --- | --- | | Points | Condition |  | Points | Condition | | 10 | The issue is deemed likely to occur and poses a significant negative impact |  | 10 | The response strategy is deemed to avoid / significantly mitigate the issue and is resource-efficient | | 7 | The issue is deemed likely to occur or poses a significant negative impact | **+** | 7 | The response strategy is deemed to somewhat mitigate the issue and is viable | | 0 | The issue is deemed neither likely to occur nor poses a significant negative impact |  | 0 | The response strategy is deemed to neither significantly mitigate the issue or is not viable |   Total = 100% of the maximum allocation of **40** points *(2 issues x (max 20 + 20) = 40* points*).*  *The response should not exceed one (1) page in length.* |

1. **SUBMISSION RESPONSE FORMS**

4.1 Substantiation of compliance to Resource criteria should employ the formatting contained in the following forms, as requested by Resource criterion. Note that Bidders may use more space than is illustrated in the form template, respecting any page limits identified in the Resource criterion.

4.2 *Form A: “Summary Listing of the Experience of the Proposed Resource”*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Start  *mm-yy* | End  *mm-yy* | Client  Organization | Project / Program | Resource  Role | Services  Provided |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

4.3 *Form B: “Example Project”*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Client Organization | Reference Name | | Telephone | | Email |
| Project Name | Resource Role | | | | |
| Project Description | Resource Involvement | | | | |
| Start (*mm-yy)* | End (*mm-yy)* | | Days Effort | |
| Services Provided | | | | |