

BIDDER'S WORKBOOK

INTRODUCTION

The Bidder's Workbook is comprised of the RFP Documents that are denoted by WB.

The Bidder's Workbook documents describe the Bid evaluation and ranking process and include the Bid submission forms.

Bidders must use the forms in the Bidder's Workbook when preparing their Bid. If a Bidder uses a different form or approach, the Bid may be disqualified.

BID SUBMISSION REQUIREMENTS

The following approach must be used in the preparation of Bidder's Bid package:

FORM	Bid Document
Technical Bid	Technical Bid document that responds to the questions set out in WB-B (Technical Questionnaire)
Financial Bid	Completed Excel Spreadsheet using WB-C (Financial Workbook)
Submission Confirmation Form	Completed WB-D (Submission Confirmation Form)

Alternative Solutions or Approaches

Where a proponent wants to propose an alternative approach or solution they must submit a separate independent bid as per RFP-1 (RFP Process and Timelines), section 12(d).

BID EVALUATION AND RANKING METHOD

Selection of the Preferred Bidder will be based on the highest scoring Bid that satisfies all mandatory requirements and achieves the minimum required scores.

Technical Bid Rated Criteria

The Technical Bid consists of the Bidder's responses to the questions in document WB-B (Technical Bid Questionnaire). Points will be allocated and weighted as described below.

The responses provided in the Technical Bid will be evaluated as described by the scoring methodology in the Workbook with points allocated as follows:

TECHNICAL BID EVALUATION – CRITERIA AND POINTS			
Section Description	Sub-Section	Points Available	Minimum Threshold
Section 1: Letter of Introduction		N/A	N/A
Section 2: Project Goals and Business Drivers	Project Goals and Business Drivers	25	10
Section 3: Project Management	Project Team Experience User Acceptance Test Project Plan Product Support and Lead Times	50	20
Section 4: AMI System	AMI System Experience AMI Radio Transmitter AMI Network Standalone City-Owned AMI Network Third Party-Owned AMI Network Coverage of Kilkare Woods Software AMI Software AMI Software Support and Training Customer Portal Future-proof	125	50
Section 5: Water Meters Supply	Water Meter Experience Water Meter and Encoder Register Performance and Functionality Enhanced Encoder Functionality Water Meter Warranty	100	40
Section 6: Installation Services	Installation Project Experience Warehouse and Office Project Personnel Work Requirements Safety Requirements Data Management Customer Service Public Outreach Quality Control	100	60
Section 7: Exceptions to Scope of Work	See Section 7 WB-Questionnaire		
Section 8: References	See Below		
TOTALS		400	160

A minimum score of 40% is required for each Section and a minimum total score of 40% is required for the Technical Response Workbook (i.e., 160 out of 400 points) is required to proceed to the next phase: Demonstration evaluation.

Only the two or, at the City's discretion, three highest scoring Bidders that achieve the required minimum scores will be short-listed and invited to proceed to the Demonstrations.

In the event that no Bidders achieve the minimum required scores, the City may elect to short-list the two highest scoring Bidders to proceed to the Demonstrations or may elect to cancel the RFP process.

DEMONSTRATION and EXCEPTIONS

Short-listed Bidders will be invited to demonstrate, in an example environment, that the AMI Solution performs the functions required, as explained in the Bidder's Technical Bid and as detailed in the Scope of Work, and to demonstrate several use cases which will be communicated by the City to the short-listed Bidders in advance of the Demonstration session.

A maximum of **250 points** is available for the Demonstration. Additional details regarding the breakdown of the criteria and scoring methodology will be provided to the short-listed Bidders in advance of the Demonstration sessions.

A minimum score of 40% of the total points allocated to the Demonstration is required to proceed to the next phase. Only Bidders achieving a minimum score of 40% of the total points available for Demonstration (i.e., 100 out of 250 points) will proceed to the Financial Bid Evaluation step.

If no Bidders achieve the minimum required score, the City may elect to proceed to the Financial Bid Evaluation with the highest scoring Bidder or may elect to cancel the RFP process.

Short-listed Bidders will be provided a copy of the City's Terms and Conditions upon notification and will be asked to provide any Exceptions on or before their demonstration date. Given the time constraints of this Project and the desire to expedite contract negotiations, **50 points** have been allocated to minimizing Exceptions to the City's Terms and Conditions.

Technical Bid Evaluation And Demonstration/Exception Scoring

For purposes of calculating the Total Bid Score to be used in identifying the Preferred Bidder, scores from the Technical Bid Evaluation will be added to scores from the Demonstration/Exceptions and a 70% weighting factor applied such that the Maximum points available for Technical Bid plus Demonstration/Exceptions will be 700 points for purposes of the Total Bid Score.

MAXIMUM POINTS AVAILABLE FOR TECHNICAL BID EVALUATION, DEMONSTRATION and EXCEPTIONS	700
--	------------

Technical Bid Evaluation and Demonstration Score = (Technical Bid Score + Demonstration Score) x 70%

Reference Check

A subset of the references provided will be checked (for the Bidders achieving the minimum required scores for the Demonstration only) to ensure accuracy and relevance to this Project. While the references checks will not factor into the Bidder's point total, any material misrepresentation of information provided on the reference form will result in disqualification of that Bidder from the Evaluation Process.

Financial Bid Evaluation And Ranking

Bidders must complete all pricing tables in the Financial Bid Form. The Total Solution Cost noted in the Financial Bid Form will be used to calculate each Bidder's Financial Bid score.

MAXIMUM POINTS AVAILABLE FOR FINANCIAL BID	300
---	------------

Financial Bids will be scored based on a relative pricing formula using the Total Solution Cost. Each Bidder's score will be calculated in accordance with the following formula:

$$\text{Financial Bid Score} = \text{Lowest Total Solution Cost} \div \text{Bidder's Total Solution Cost} \times 300$$

Following the evaluation of Financial Bids, the Total Bid Score will be calculated based on the formula below, and the Bidders will be ranked from highest Total Score to lowest Total Bid Score.

$$\text{Total Bid Score} = \text{Technical Bid Evaluation and Demonstration Score} + \text{Financial Bid Score}$$

MAXIMUM TOTAL POINTS AVAILABLE FOR TOTAL BID SCORE	1,000
---	--------------

Once the Total Bid Score is calculated, the City may invite the highest scoring Bidder to enter into contract negotiations as described in RFP-1 (RFP Process and Timelines), or, if deemed in the City's best interest and at its sole discretion, the City may elect to invite the 2 highest ranking Bidders to participate in the Dialogue Sessions and Best and Final Offers step, which is described below prior to selecting the Preferred Bidder.

OPTIONAL DIALOGUE SESSIONS AND BEST AND FINAL OFFERS (BAFOs)

If this option is exercised, during this stage, the City will schedule one or more dialogue sessions with each of the top-ranked Bidders for the purposes of discussing, clarifying, and ensuring a common understanding of the City's requirements and the Bidder's Bid.

During the dialogue sessions, Bidders may be asked to explain and discuss any discrepancies or gaps between their proposed AMI Solution and the City's requirements, preferences and expectations, as well as any discrepancies between their Technical Bids and their Demonstrations.

Bidders may also be asked to explain and confirm all pricing information in their Bids and may be asked to provide additional pricing information and/or breakdown of its pricing in their BAFOs.

After the conclusion of the dialogue sessions, each Bidder may be invited to revise its initial Bid, as needed, and submit its Best and Final Offer ("BAFO") to the City.

The Bidder's BAFO should clearly address:

- any discrepancies between the information in the Bidder's Technical Bid and what was demonstrated during the demonstrations;
- any discrepancies or gaps between the Bidder's proposed AMI Solution and the City's requirements that are identified during the dialogue sessions;
- any additional information, including additional pricing information, that may be requested at this stage.

BAFO Evaluation and Final Ranking

Any revisions made to the Bidder's Technical Bid will be assessed and rescored using the same Technical Bid Rate Criteria set out above.

The Bidder's score for the Demonstrations will not change.

The Bidder's BAFO Financial Bid will be scored using the same Financial Bid Evaluation method set out above.

The Bidders will then be ranked based on highest Total BAFO Score, calculated as follows:

Total BAFO Score = Adjusted Technical Bid Score + Demonstration Score + BAFO Financial Bid Score

The "Preferred Bidder" will be the top-ranked Bidder based on the highest Total BAFO Score.