**Appendix 2**

**Technical Response Workbooks**

**Section 1 – Proponent Information Form**

**Include a brief overview of your firm or company including the following information.**

|  |  |  |
| --- | --- | --- |
| Proponent name: | |  |
| Ownership structure  (Sole Proprietorship, Partnership, Corporation) | |  |
| Jurisdiction of incorporation  (if applicable) | |  |
| Head office address: | | |
| City: |  | |
| Street: |  | |
| State/Province: |  | |
| Area Code/Postal Code: |  | |
| Phone: |  | |
| Fax: |  | |
| Individual authorized to negotiate and sign agreement on behalf of the Proponent: | | |
| Name: |  | |
| Title: |  | |
| Phone: |  | |
| Fax: |  | |
| E-mail: |  | |
| Primary contact for this process and subsequent bid sent out: | | |
| Name: |  | |
| Title: |  | |
| Phone: |  | |
| Fax: |  | |
| E-mail: |  | |

**Section 2 – Mandatory Requirements**

**Requirements Table**

Proponents are to confirm compliance with the Requirements in the table below. A “Yes” indicates compliance and “No” indicates non-compliance. The Proponent should indicate in the table below the relevant section and page number(s) in its Proposal where any information relevant to a Mandatory Requirement can be found.

Note: Responding “No” to any of the Requirements below will make the Proposal non-compliant and result in a disqualification from further evaluation or consideration pursuant to this RFP.

On the request of AHS at any time, Proponents shall be required to provide evidence for each of the Mandatory Requirements below for validation purposes.

| **Mandatory Requirements** | | **Comply**  **Yes/No** | **Section/Page # in Proposal (if applicable)** |
| --- | --- | --- | --- |
| Item |  |  |  |
| M 1 | Appendix 3 - Proponent Declaration completed by the Proponent in accordance to the instructions contained in that form. |  |  |
| M 2 | Appendix 4 - Statement of Full Disclosure and Conflict of Interest Declaration, completed by the Proponent in accordance with the instructions contained in that form**.** |  |  |

**Section 3 – Rated Criteria**

Each Proponent’s Proposal will be evaluated against identified Rated Criteria. The table below shows the allocation of the points within the Rated Criteria. Proponents are to respond to each question forming part of the criteria in the provided response section. Where possible, Proponents are not to refer to attached materials, although in some circumstances such references are necessary given the nature and complexity of the subject matter.

| **Rated Criteria** | **Weight** |
| --- | --- |
| 1. **Company Overview** | 20 |
| 1. **Experience within Category** | 60 |
| 1. **Schedule and Account Management** | 20 |
| 1. **References (Not Scored)** | Not Scored |
| **TOTAL** | **100** |

**Section 4 – Response Section**

GENERAL COMMENTS

1. Proponents may submit for as many Zones and Categories as they choose.
2. A separate Technical Response Workbook is required for each Category submission.
3. Defined terms shall have the same meaning as those used in this RFP.

STEP BY STEP COMPLETION INSTRUCTIONS

1. Review AHS Category requirements indicated in Schedule C.
2. Complete **Appendix 2 -** **Technical Response Workbook** for each Category submission.
3. Ensure all information requested is completed.

Proponents must indicate the appropriate Zone and Category that this Response Workbook applies to in the below table:

|  |  |
| --- | --- |
| **Indicate the Zone(s) as per Schedule D – AHS Zone Map, which this Service Category applies to:** | **Indicate the Category as per description in Schedule C – Service Category Requirements for Contractor Services which this workbook applies to:** |
| (North, Edmonton, Central, Calgary, South, or Provincial)  \*One or more Zones can be selected | (Example: General Contractor, Mechanical Contractor)  \*Only 1 Category per response workbook |

1. **Company Overview**

Provide a brief overview of the company, as it relates to each Service Category being applied to, including the following details:

* + 1. Provide a summary of the corporate structure of the company in the form of an organizational chart and include office locations;
    2. Number of employees within the company;
* Full time
* Part time
* Other
  + 1. Provide a general overview of the services that the company offers;
    2. Provide proof of the company’s ability to perform services in the selected geographical areas.
    3. Provide evidence of stable ownership; have consistent ownership, and have been in business for at least five years;
    4. Provide evidence of proven and consistent management structure and team.
    5. Indicate items that aid in demonstrating a high level of credibility within the Service Category such as certifications, industry awards, and innovations.

RESPONSE: (Please also indicate page numbers / reference numbers in the Proposal for each of the above item.)

1. **Experience Within Category**

Provide a summary of the following:

* + 1. The experience for the Category your organization is applying for in the table below. Proponents need to provide a **minimum** of five (5) projects for the applicable Service Category with supporting details per (i) to (iii) below. Proponents can expand the chart as needed or can attach additional pages to describe the experience. Proponents who will provide the recent year (s) experience examples (i.e.10 years) will get higher scores.
       1. Highlights of your company’s experience in the successful development and/or renovation/ upgrades of healthcare facilities or institutional facilities. e.g. Universities, Laboratories, Research Facilities;
       2. All project experience should be clearly delineated based on the category needs. Each project listed above should include an overview of the project, the budget, start and end date of the project and a list of key team members involved in the projects and their roles; and
       3. A company’s experience must be clearly communicated in the proposal and may include both the company’s relevant experience as a business and/or that of individual experts within the company.

|  |  |  |
| --- | --- | --- |
| **Project #1** | | |
| **Item** | **Response** | **Supplementary Reference Material** ((Include Proposal page/reference number [if needed]) |
| **Project Name**  (Include Proposal page/ reference number |  |  |
| **Applicable Service Category**  (Include Proposal page/ reference number |  |  |
| **Response for (a) i**  (Include Proposal page/ reference number |  |  |
| **Response for (a) ii**  (Include Proposal page/ reference number |  |  |
| **Response for (a) iii**  (Include Proposal page/ reference number) |  |  |

|  |  |  |
| --- | --- | --- |
| **Project #2** | | |
| **Item** | **Response** | **Supplementary Reference Material (**(Include Proposal page/ reference number [**if needed])** |
| **Project Name**  (Include Proposal page/ reference number |  |  |
| **Applicable Service Category**  (Include Proposal page/ reference number |  |  |
| **Response for (a) i**  (Include Proposal page/ reference number |  |  |
| **Response for (a) ii**  (Include Proposal page/ reference number |  |  |
| **Response for (a) iii**  (Include Proposal page/ reference number |  |  |

|  |  |  |
| --- | --- | --- |
| **Project #3** | | |
| **Item** | **Response** | **Supplementary Reference Material (**(Include Proposal page/ reference number [**if needed])** |
| **Project Name**  (Include Proposal page/ reference number |  |  |
| **Applicable Service Category**  (Include Proposal page/ reference number |  |  |
| **Response for (a) i**  (Include Proposal page/ reference number |  |  |
| **Response for (a) ii**  (Include Proposal page/ reference number |  |  |
| **Response for (a) iii**  (Include Proposal page/ reference number |  |  |
| **Project #4** | | |
| **Item** | **Response** | **Supplementary Reference Material (**(Include Proposal page/ reference number [**if needed])** |
| **Project Name**  (Include Proposal page/ reference number |  |  |
| **Applicable Service Category**  (Include Proposal page/ reference number |  |  |
| **Response for (a) i**  (Include Proposal page/ reference number |  |  |
| **Response for (a) ii**  (Include Proposal page/ reference number |  |  |
| **Response for (a) iii**  (Include Proposal page/ reference number |  |  |

|  |  |  |
| --- | --- | --- |
| **Project #5** | | |
| **Item** | **Response** | **Supplementary Reference Material (**(Include Proposal page/ reference number [**if needed])** |
| **Project Name**  (Include Proposal page/ reference number |  |  |
| **Applicable Service Category**  (Include Proposal page/ reference number |  |  |
| **Response for (a) i**  (Include Proposal page/ reference number |  |  |
| **Response for (a) ii**  (Include Proposal page/ reference number |  |  |
| **Response for (a) iii**  (Include Proposal page/ reference number |  |  |

1. **Scheduling and Account Management**

Provide the following information as they relate to each Service Category being applied to:

* + 1. Proponent will provide a summary of their ability to maintain and achieve clients’ overall project schedule.
    2. Proponent will demonstrate superior communication and documentation processes and appropriate uses of technology to support their methodology.
    3. Proponents that demonstrate ability and provide examples of tools for reporting and managing projects will receive higher scores.

RESPONSE: (Please also indicate page numbers / reference numbers in the Proposal for each of the above item.)

1. **References: (Not Scored)**

| Proponents are requested to provide details for previous customer engagements specific to the Service Category. Clients should be either current or recent within the past 2 years.  Please Note: The Proponent may submit, but are not obligated, up to two (2) AHS references. The Proponent will not contact AHS references provided below while this RFP is open. | |
| --- | --- |
| **Client #1** | |
| Name of client or Organization: | |
| Telephone: | Email: |
| Term Value of Contract/Project:        (# of Resources Assigned to the Contract/Project):  Duration of Contract/Project: | |
| Brief summary of engagement: (Please note: References provided should align to the Service Category applied for) | |
| **Client #2** | |
| Name of client or Organization: | |
| Telephone: | Email: |
| Term Value of Contract/Project:       (# of Resources Assigned to the Contract/Project):  Duration of Contract/Project: | |
| Brief summary of engagement: (Please note: References provided should align to the Service Category applied for) | |
| **Client #3** | |
| Name of client or Organization: | |
| Telephone: | Email: |
| Term Value of Contract/Project:       (# of Resources Assigned to the Contract/Project):  Duration of Contract/Project: | |
| Brief summary of engagement: (Please note: References provided should align to the Service Category applied for) | |