



Best Value Model

Pre-Proposal Information

RFP 2014-022

Physiotherapy Services



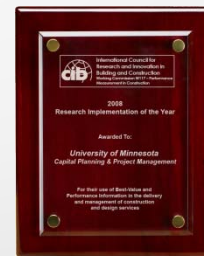
PERFORMANCE BASED STUDIES RESEARCH GROUP

www.pbsrg.com

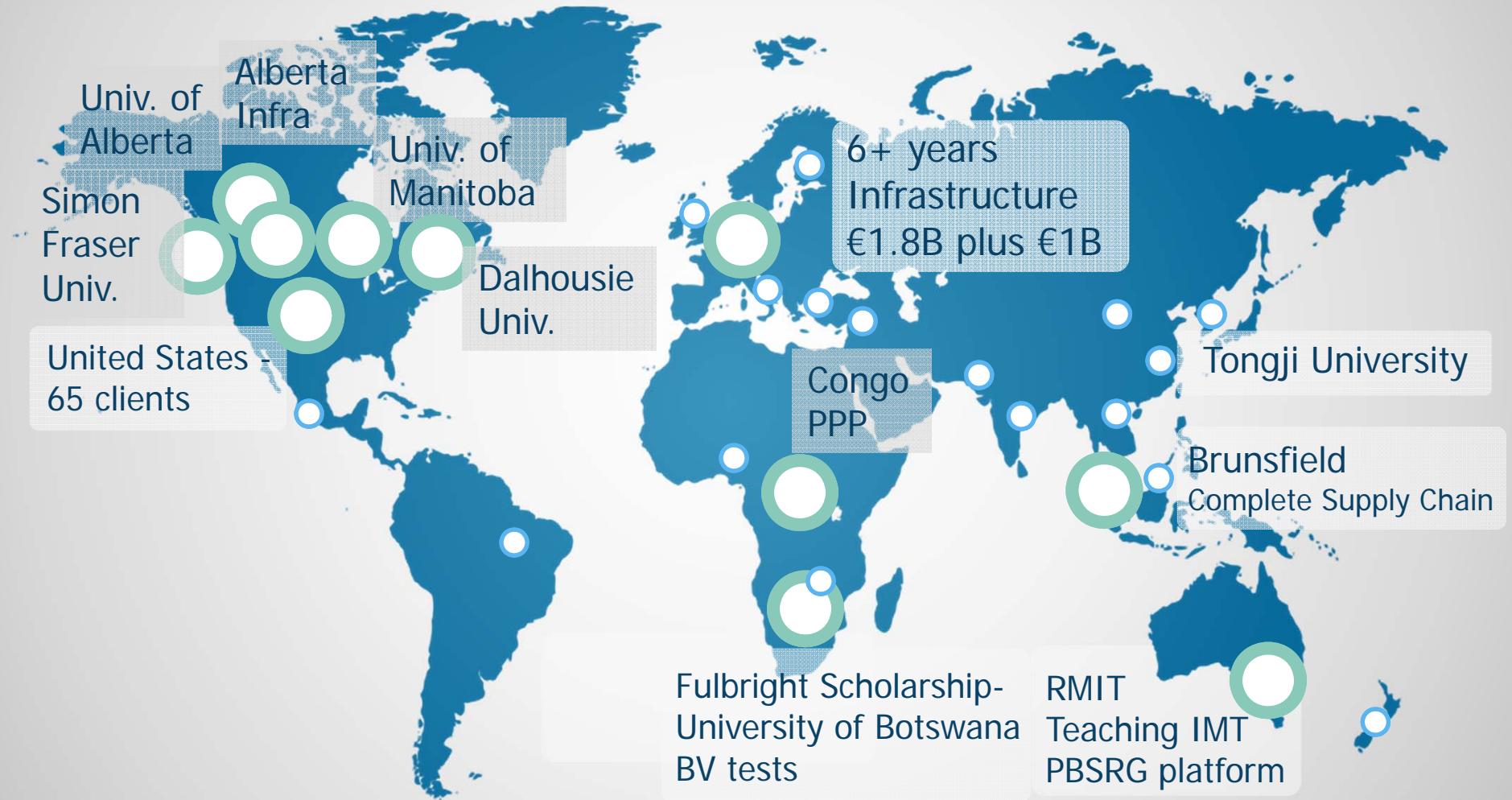
PBSRG's Research Results




- Worldwide leader in Best-Value Systems
 - 18 Years
 - 210+ Publications
 - 550+ Presentations
 - 1600+ Projects
 - \$5.7 Billion Services & Construction
 - 98% Customer Satisfaction
 - Various Awards (PMI, NIGP, IFMA, COAA, IPMA)
 - Owners: Federal, State, Local, School Districts, Private



International Efforts & Partners



BEST VALUE

-  U.S. General Services Administration (GSA)
-  US Army Medical Command
-  Arizona State University
-  Canon
-  State of Oklahoma
-  City of Phoenix, AZ
-  University of Minnesota
-  State of Alaska
-  Rijkswaterstaat (Dutch public works & water management)
-  Aramark
-  State of Oregon
-  State of Idaho
-  University of Alberta
-  Boise State University
-  United Airlines
-  Neogard / Jones-Blair
-  Tremco
-  Bank of Botswana
-  General Dynamics C4 Systems
-  Salt River Project (SRP)
-  US Air Force Logistics Command
-  US Coast Guard
-  US Embassy (Botswana)
-  US Army Corps of Engineers
-  Federal Aviation Administration
-  IBM
-  Brunswick
-  Qwest
-  Honeywell
-  City of Peoria, AZ
-  University of Idaho
-  University of Hawaii
-  University of New Mexico
-  Entergy
-  Sodexo
-  Chartwells
-  Dallas Independent School Dist.
-  Olmstead County, MN
-  City of Roseville, MN
-  Hennepin County, MN
-  Scenter
-  Abengoa Solar
-  City of Sitka, Alaska
-  US Solar
-  Rochester Public Utilities
-  Harvard University
-  Denver Health & Hospital Authority
-  State of Missouri
-  State of Washington
-  Idaho Transportation Department
-  State of Georgia
-  Arizona State Parks
-  United Excel
-  East Valley Institute of Technology
-  Arizona Public Service (APS)
-  Rochester School District
-  Fann Environmental
-  Idaho State University
-  On Semiconductor
-  Pearson
-  State of Wyoming
-  Idaho Department of Corrections
-  City of Miami Beach, FL
-  Lewis & Clark State College
-  Hawaii Department of Transportation
-  Baptist Health
-  City of Columbia, SC
-  PECO Energy
-  Intermediate District 287

PARTNERS

PROJECT PARTNERS AND PARTICIPANTS:

Information Technology

networking help desk services
data centers eProcurement
hardware
COTS software
ERP systems

Facility Management

maintenance custodial
landscaping conveyance
security service pest control
building systems
industrial moving
waste management
energy management

Health Insurance/ Medical Services

Manufacturing

Business / Municipal / University Services

dining material recycling
multi-media rights bookstores
fitness equipment furniture
online education
document management
property management
audiovisual
communications systems
emergency response systems
laundry

Construction / Design / Engineering

large gc small gc DBB
infrastructure renovation CMAR
municipal repair DB
laboratory maintenance IDIQ
education roofing JOC
hospital demolition Low Bid
financial development IPD
large specialty supply chain



PERFORMANCE BASED STUDIES RESEARCH GROUP

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CLIENTS USING THE ASU PROCESS INCLUDE:



\$450M+ procured
\$700M+ project value

...WITH MORE BEGINNING EACH MONTH

This presentation is being provided for educational purposes only

Please refer to the RFP for specific instructions

If there are any inconsistencies, the RFP and Amendments shall take precedence over this presentation

Best Value Model



Value-Proposition

- Cost, Capability, Value

Goal:

Differentiate Expertise

Best Value Model



NOT GOING TO CHANGE...

- Specifications
- Terms and Conditions
- Insurance & Bonding
- Contract
- Delivery System
- Pricing / Financials

Process overlays on top of these...

Best Value Objectives



- Minimize risk of non-performance
 - Highest value for cost
 - Leverage Proponent expertise to optimize project delivery
 - Differentiate: key individuals and their plan to deliver the project
 - Become a client of choice
- Minimize the need for client management & decision making.
 - Ability to lay out optimal project plan
 - Identify what you need from the Client
 - Opportunity to maximize profit by being more efficient

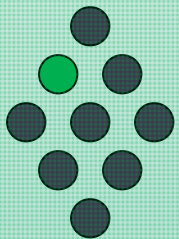
Value Based Project Delivery

SELECTION

PRE PLANNING

PROJECT MANAGEMENT

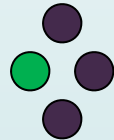
Filter 1
Proposal Evaluations



Evaluation Criteria

- Price / Cost / Fee
- Service Capability
- Risk Assessment
- Value Added
- Past Performance Information (PPI)

Filter 2
Interview
Key Personnel



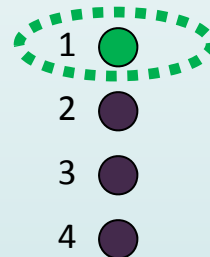
Short List
prior to
Interviews
(if necessary)

Filter 3
Prioritization
(Identify
Best Value)



Total Evaluation
Scores are
determined

Filter 4
Cost
Reasonableness
Check



Logic check to
confirm Selection of
the potential Best
Value Proponent

Filter 5
Pre-Award &
Clarification



Pre Award Activities

- Training
- Kickoff Meeting
- Planning & Clarifying
- Summary Meeting

Project Execution
Risk Reporting &
Close Out Rating



Project Execution

- Weekly Risk Report
- Director Report
- Performance Meas.
- Close Out Ratings

Contract Award

Selection Objective

Selection based upon **Proponent Expertise**

How to differentiate expertise?

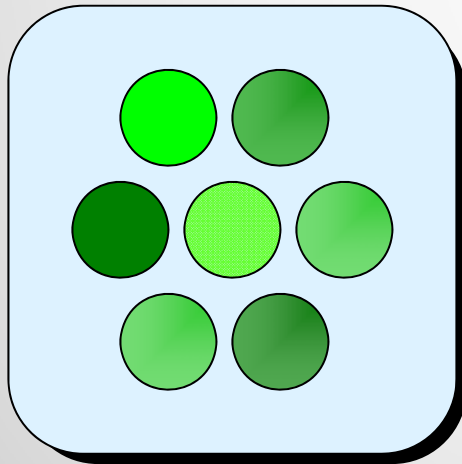
- Ability to understand the project & plan your approach
- Identify & mitigate risks to the project
- Add value to optimize project
- Cost Competitive

What are we trying to accomplish?

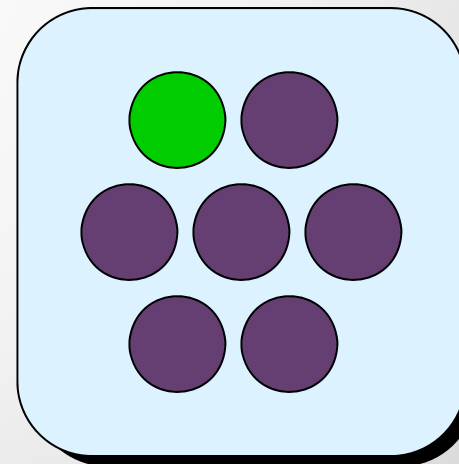
Question:

If Purchasing wants to buy a “green circle”, in which scenario is hiring the right “green circle” easiest to justify?







Scenario 1



Scenario 2



Evaluation Criteria

Physiotherapy Criteria	Weight	Committee Rating	Numerical Value
Interviews	30		
Risk Assessment	20		
Service Capability	20		
Proposal Fee	15		
Value Added	10		
Past Performance Information	05		
Sample Treatment Status Report	P/F	-	-
Sample Invoicing Reports	P/F	-	-
Proponent Generated Solution	Optional	-	-
TOTAL	100 pts		

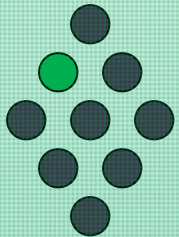
Value Based Project Delivery

1 SELECTION

2 PRE PLANNING

3 PROJECT MANAGEMENT

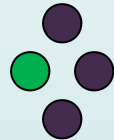
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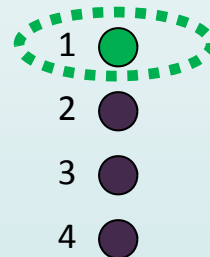
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Project Execution
Risk Reporting &
Close Out Rating



Project Execution

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- Director Report
- Performance Meas.
- Close Out Ratings

Contract Award

3 Written Submittals

Blind Evaluations: standard templates, no modifications, and no names.

Service Capability

= capability to
meet
Requirements
(technical plan)

Risk Assessment

= key risks
(you don't control)

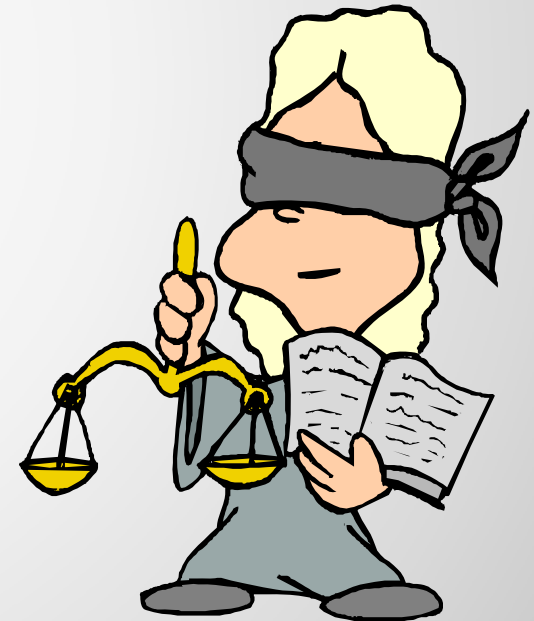
Value Added

= additional
expertise
beyond
requirements

2 pages each = 6 pages in total

Format of Submittals

- ✦ **DO NOT** submit identifying names, pictures, clients, logos, etc.
- ✦ Template are provided and must be used.
- ✦ Proponents are NOT allowed to re-create, re-format, or modify the templates.
- ✦ The plans should not contain marketing material.
- ✦ Each submitted = must NOT exceed **2 pages**.



Service Capability

Service Capability

= capability to meet Requirements (technical plan)

Risk Assessment

= key risks (you don't control)

Value Added

= additional expertise beyond requirements

Service Capability



SCHEDULE "E" SERVICE CAPABILITY

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The Proponent is to identify capability claims for how they plan to execute the services. The Service Capability submittal is structured to allow Proponents to provide a narrative of their approach or documented performance for: how the Proponent will address technical concerns that are within the Proponent's control during service execution and how the Proponent will deliver critical aspects of the service claims of professional experience and certifications, and/or other capabilities possessed by the Proponent and their key personnel. (You may delete these instructions.)

Technical Concern 1: _____
Approach / _____
Documented _____
Performance 1: _____

Technical Concern 2: _____
Approach / _____
Documented _____
Performance 2: _____

Technical Concern 3: _____
Approach / _____
Documented _____
Performance 3: _____

Technical Concern 4: _____
Approach / _____
Documented _____
Performance 4: _____

Technical Concern 5: _____
Approach / _____
Documented _____
Performance 5: _____

Technical Concern 7: _____
Approach / _____
Documented _____
Performance 7: _____

END OF SCHEDULE "E"

Technical Concern 1: _____
Approach / _____
Documented _____
Performance 1: _____

Example of Solutions

Risk: Decline in Customer Service Standards

Type: Service Capability



- **Plan 1**
 - We will use our 20 years of experience in bookstore services to minimize the risk of declining customer service standards.
- **Plan 2**
 - Sales associate training is key. We have a formal training program for new employees (and an annual refresher training for current employees) that has been successful at 5 previous service sites of similar size and scope.
 - We will implement a secret shopper program to ensure we maintain our company-wide 88% positive rate and our 93% positive local rate.
 - We will also conduct annual customer service satisfaction surveys with direct end-users. Suggestions and complaints will be incorporated in a proposed annual performance review meeting with the Owner group to reassess opportunities to add value after each year during the contract.

Example of Solutions

Risk: Availability of Online Self-Service Portal for Online Housing Applications

Type: Service Capability

- **Plan 1**

- Vendor will evaluate existing Owner software platforms to ensure integration and availability of the Online Self-Service Solution

- **Plan 2**

- Vendor will provide a Portal Framework for all online self-service solutions. This Portal does not require any 3rd party web development software or web development expertise by the Owner.
- This approach minimizes risk of error and downtime that would normally occur if the Owner was required to use html templates, dedicate a web developer, or have to modify html code directly.
- The Portal Framework has been used on three previous projects with zero downtime events.

Example of Solutions

Risk: Emergency Response

Type: Service Capability

Travel Management company using an outsourced Emergency Travel service.

An outsourced service may not have access to the client's company or personal profiles. This can result in additional costs. Not being a direct client of this service, the service level can be minimal.

In-house wholly owned 24/7 Emergency Travel Centre (ETC)

- Service provided by our employees with access to corporate and personal profiles
 - Access to original reservations, both full service and online
 - All ETC calls and changes are tracked and reported
-

Example of Solutions

Risk: Management Reporting

Type: Service Capability

Inaccurate & inconsistent Management Reporting

You can't manage what you can't measure. Accurate reporting is a key element and requirement in successful vendor negotiations and in support of those agreements. Without reporting, you would not be able to have a clear understanding of your travel trends and volumes. Travel management reporting is key in supporting the travel policy.

A web based reporting tool that provides 120 **pre and post** trip management reports.

- Allows online access via a secure log-in anytime, anywhere
- Tools to measure and manage vendor support and policy compliance
- Management reports can be sent out regularly to designated contacts
- Regular reviews of your management reports will provide "true" analyses on opportunities for contract negotiation, viability of flight passes for frequent travellers, as well as, an audit tool to identify non-compliance to policy

Example of Solutions

Risk: Noise from Demolition

Type: Service Capability



- **Plan 1**

- We will work with the user to minimize the impact of noise from demolition.

- **Plan 2**

- We have planned to demolition during off hours and weekends. This will have a slight impact on our cost (less than 1%), but the impact to customer satisfaction justifies this.
- We will also install rubber sheets on the floors to diminish noise and vibrations.
- Both solutions can be performed within your budget.
- Both solutions have been used on multiple previous projects w/ high levels of customer satisfaction (9.4/10).

Example of Solutions

Risk: Documented Performance

Type: Service Capability



- Project Manager Experience
 - The proposed Project Manager and Pre-Construction Manager have put in place \$87.4M in design-build construction projects in the past five years.
 - The team's schedule deviation is (-1.5%), their Vendor generated change order rate is 0%, and their overall customer satisfaction rating is 98%.
- Roofing SubVendor
 - We have selected a roofing Vendor who surveyed 8 past clients on completed jobs worth \$750,000 and received a customer satisfaction rating of 10 out of 10.

Risk Assessment

Service Capability

= capability to meet Requirements (technical plan)

Risk Assessment

= key risks (focus on risks you don't control)

Value Added

= additional expertise beyond requirements

Risk Assessment

Template

2 pages max.



Section 00413
RFP 2013-098
PROPOSAL FORM
APPENDIX "E"

APPENDIX "E" TO PROPOSAL FORM RISK ASSESSMENT

This template must be used. Modifications to the format of this template may result in disqualification (i.e. altering font size, altering font type, adding colours, adding pictures, etc.). Do not list any names/information that can be used to identify your firm. You may add/delete additional rows but do not exceed the 2-page limit. **(You may delete these instructions.)**

The Proponent is to identify risk items they do not control and clearly state their plan to minimize these risks from negatively impacting project performance. Risks should be listed according to priority. **(You may delete these instructions.)**

Risk 1:
Why is it a _____
Risk? _____
Solution: _____



Risk 2:
Why is it a _____
Risk? _____
Solution: _____

Risk 3:
Why is it a _____
Risk? _____
Solution: _____

Risk 4:
Why is it a _____
Risk? _____
Solution: _____

Risk 5:
Why is it a _____
Risk? _____
Solution: _____

Risk 6:
Why is it a _____
Risk? _____
Solution: _____

Example of Solutions

Risk: Safe Food Supply/Food Born Illness

Type: Risk Assessment



- **Plan 1**

- We will work with the owner to ensure proper response protocol in the event of a food-borne illness
- In the unlikely event of a food-borne illness, our strong relationships with local, state, and national health agencies will ensure a 24-hour response.

- **Plan 2**

- If a food safety issue arises, the client's risk of exposure will be minimized by:
 - 1) Vendor's system will issue a safety alert and related directives to 10,000+ units and all ASU email accounts in less than 15 minutes.
 - 2) The vendor will place a lock within in its foodservices purchasing system on any food with risk so it cannot be purchased,
 - 3) The vendor will remove all potentially harmful products within the first hour of notice.
 - 4) The vendor will identify as many purchasers as possible through credit receipt names and the client system to notify them individually. Warnings will be placed around campus within two hours of discovery.

Example of Solutions

Risk: Loss of Radio Flagship in Major Market

Type: Risk Assessment



- **Plan 1**

- We will work very hard to maintain excellent affiliate relationships. If we lose a radio station (e.g. it changes its format) we will move quickly to replace the lost station. If we cannot quickly replace a flagship station, we can be very creative and could even consider purchasing all local inventory from a new flagship station.

- **Plan 2**

- In the past 10 yrs, on over 50 accounts, 7 radio stations format changes have occurred. The following solution is optimal.
- We own and will maintain two radio contracts covering the area, where signals can be switched if required. The flagship station will be the station with the stronger signal and greater coverage.
- If a station is lost we will have a equal replacement within 2 months. If within two months a replacement is not contracted we will purchase inventory from another station or discount the cost of an inventory purchase and add it to our payments to the client.

Risk Assessment Example



- **RISK:** Major risk items typically associated with transit implementations revolve around change management and business process impact. New technology implementations create change for the users. Change often causes issues with technology adoption. Requirements and scope creep also creates challenges. Systems may have thought a certain technology or component was incorporated in the RFP and/or needs assessment process that is not included in the actual scope of work or contract. Communication is also an area that can be a challenge.
- **SOLUTION:** A clearly defined scope of work and communication of the scope at the beginning of the project minimizes scope creep. If there is a discrepancy, scope or requirements can be discussed early on in the process versus at the end of the process. Communication is the key to successful implementations. Change management and business process re-engineering for organizations can be minimized at the technology and management levels. Management can get early buy-in at the “grass roots” level and include them in the technology planning process. The Team focuses on providing very configurable and flexible tools to minimize process re-engineering tasks. The Team focuses on automating existing business processes and providing additional tools to improve those processes that need to be improved such as data management.

Example of Solutions

Risk: Getting water to the site

Type: Risk Assessment



- **Plan 1**

- Coordination with [water company] is critical. We will coordinate and plan with [water company] as soon as the award is made to make sure that we get water to the site to irrigate the fields.

- **Plan 2**

- We will coordinate and schedule the water with [water company]. However, based on past experience there is a high risk they will not meet the schedule (the water company does not meet schedule over 90% of the time).
- We will have temporary waterlines setup and ready to connect to the nearby fire hydrant to irrigate until [water company] is ready.
- We will also have water trucks on-site if there is problems with connecting the lines.

Value Added

Service Capability

= capability to meet Requirements (technical plan)

Risk Assessment

= key risks (you don't control)

Value Added

= additional expertise beyond requirements

Why a Value Added Plan?

Opportunity to identify value added options that may benefit the Owner:

1. Increase customer satisfaction
 2. Increase service beyond the requirements
 3. Provide ways to **optimize the financial proposal**
- **MUST** have a **cost** impact (and possibly schedule impact)
 - If none, denote as "\$0"
 - **NOTE**: Value added options ideas are **NOT** included in the base cost proposal

Value Added

Template

2 pages max.

APPENDIX "F" TO PROPOSAL FORM VALUE ADDED OPTIONS

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The Proponent is to identify any value added options, ideas, or services that are beyond the standard requirements in the tender. An explanation of "Why it is a Value Add" must be provided for each item. The corresponding cost impact of each value added option must be included. (You may delete these instructions.)

+	Item 1:	_____
	Why is it a Value Add?:	_____
	Cost Impact (\$):	_____
	Item 2:	_____
	Why is it a Value Add?:	_____
	Cost Impact (\$):	_____
	Item 3:	_____
	Why is it a Value Add?:	_____
	Cost Impact (\$):	_____
	Item 4:	_____
	Why is it a Value Add?:	_____
	Cost Impact (\$):	_____
	Item 5:	_____
	Why is it a Value Add?:	_____
	Cost Impact (\$):	_____
	Item 6:	_____
	Why is it a Value Add?:	_____
	Cost Impact (\$):	_____

Example: Value Added Items

Option to Increase Service Revenue:

- We may be able to increase revenues to the University by an additional 5% per year, if we are allowed to install and operate our own vending machines throughout campus.



Example: Value Added Items

Option to Increase Service Levels

Item 1: Zero Waste Initiatives: Styrofoam Recycling Program using an on-site (off-site option available) thermal densifier. We will collect all types of Styrofoam generated on campus from building bays for recycling and waste diversion.

Impact: Cost (\$) \$12,765.00/month for on-site option

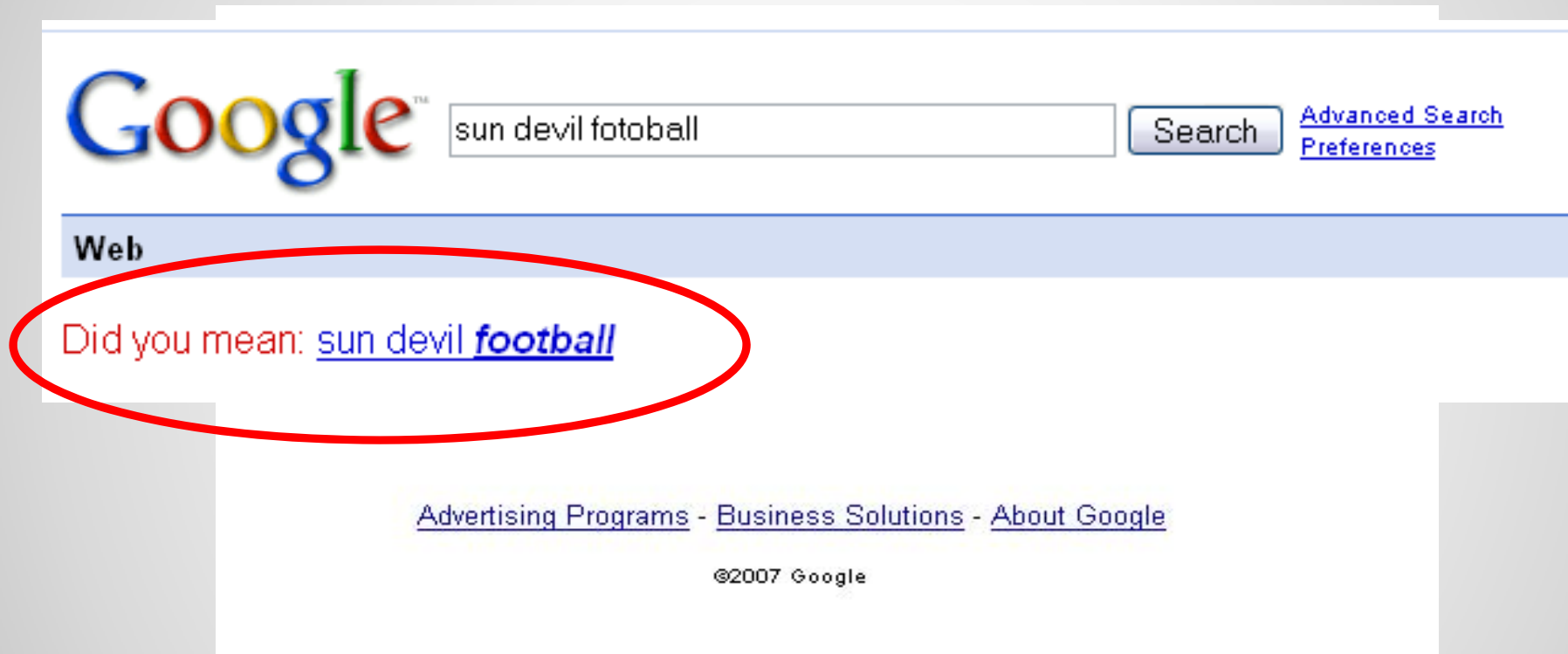
Item 3: Zero Waste Initiatives: Compostable Waste Management Program. Feasibility and cost analysis study of Campus wide compost program; Scholarship to University of Alberta Graduate Student of \$15,000 to undertake leadership role in study.

Impact: Cost (\$) \$0.00

Item 7: CIMS Green Building Certification. Third party recognition of Green practices (both University and Contractor) by ISSA accredited auditor.

Impact: Cost (\$) \$0.00

Example of Value Added



Value Added Example



- Reroofing this building will not stop all water leaks. The majority of the leaks are caused by cracks in the parapet walls, broken/missing glass, and poor caulking. For an additional \$10K and 3 weeks in schedule we can replace and repair all of these items.

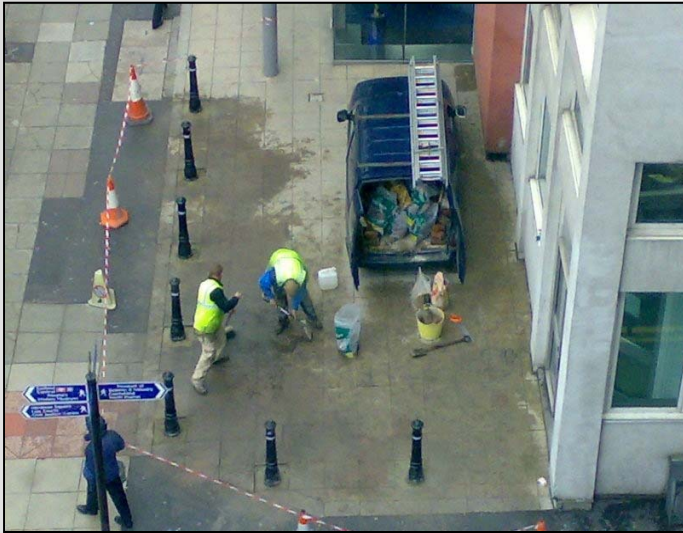
Value Added Example

Option to Reduce Project Cost:

- Instead of purchasing “Named Licenses”, the Agency may want to consider purchasing “Concurrent Licenses”. In a “Named Licensing” model, the software designates a license per user and only that particular named user can use/access the license. If that named user is in meetings, on vacation, or not using the system, the license is not utilized.
- In a “Concurrent Licensing” model, the server keeps track of the total number of licenses and loans the licenses to users as they log in. If a user is inactive, the server releases the license and allocates the license to the next user. The advantage is that the Agency is not required to purchase licenses that are not being used, which can result in approximately 25% savings in cost.



We are Looking for Vendors Who Can Think Ahead...



***...And Act In
Our Best Interest***

Page Limits

- Goal is to make the process as efficient as possible (for all parties)

- Proposal is limited to
 - **2 Pages** = Service Capability Plan
 - **2 Pages** = Risk Assessment Plan
 - **2 Pages** = Value Added Plan



- Remember: **No Names** (vendor names, product names) in any of these documents!!!!

Remember...

It is the Vendor's Responsibility
to differentiate themselves
from their competition

Things to Avoid

- **Marketing Information:**
 - *Our company is known worldwide as a leader in online education.*
 - *We will use our long history to make sure the project is a success.*
 - *We will use state-of-the-art process to make it a success.*
- **Transferring risk back to client:**
 - *We will work with the owner to resolve issues*
 - *We will have team meetings / partnering meeting with the owner*
- **General risks and/or general solutions:**
 - *We will plan ahead to coordinate activities*
 - *We will plan ahead to get classes scheduled and created*
- **Overly Technical data:**
 - *The system we propose has 200% increase in PRX bandwidth modularity.*

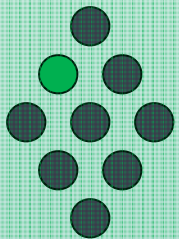
Value Based Project Delivery

1 SELECTION

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3 PROJECT MANAGEMENT

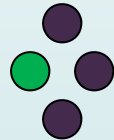
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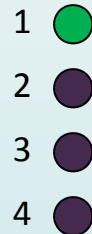
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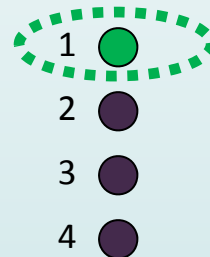
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Project Execution Risk Reporting & Close Out Rating



Project Execution

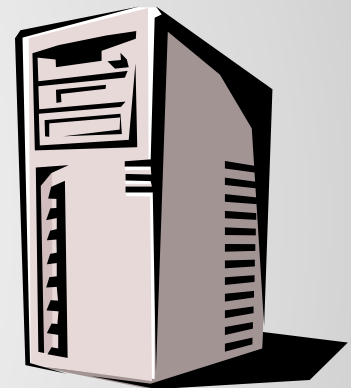
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Contract Award

Past Performance Information

Collected For:

- Company / Firm (as the Proponent) – 3 max
- Key Personnel
 - Account Representative (financial) – 3 max
 - Lead Therapist (on-site lead) – 3 max
- The Proponent picks their own references
- The Proponent collects all surveys
- Close out ratings at the end of the contract will be used to update PPI scores for future projects.



PPI Survey / Questionnaire

PERFORMANCE QUESTIONNAIRE – DESIGN BUILD PROJECT

To: _____ Survey ID _____
(Name of person completing survey)

Phone: _____ Fax: _____

Subject: Past Performance Survey of: _____
(Name of Company)

The University of Alberta (the University) is a large organization with many departments and their key personnel. The information provided in this survey is for the use of the University and its key personnel. The supplier/individual listed above is requested to appreciate your taking the time to complete this survey.

Rate each of the criteria on a scale of 1 to 10 (10 being the highest rating). Please rate each of the criteria to the particular area, leave it blank.

Client Name: _____

Project Name: _____

NO	
1	Ability to manage costs
2	Ability to provide and maintain schedules and respond to requests in a timely manner
3	Quality of work
4	Professionalism and ability to manage
5	Ability to minimize and re
6	Communication, explanation
7	Ability to work through re
8	Overall customer satisfaction and willingness to hire firm again

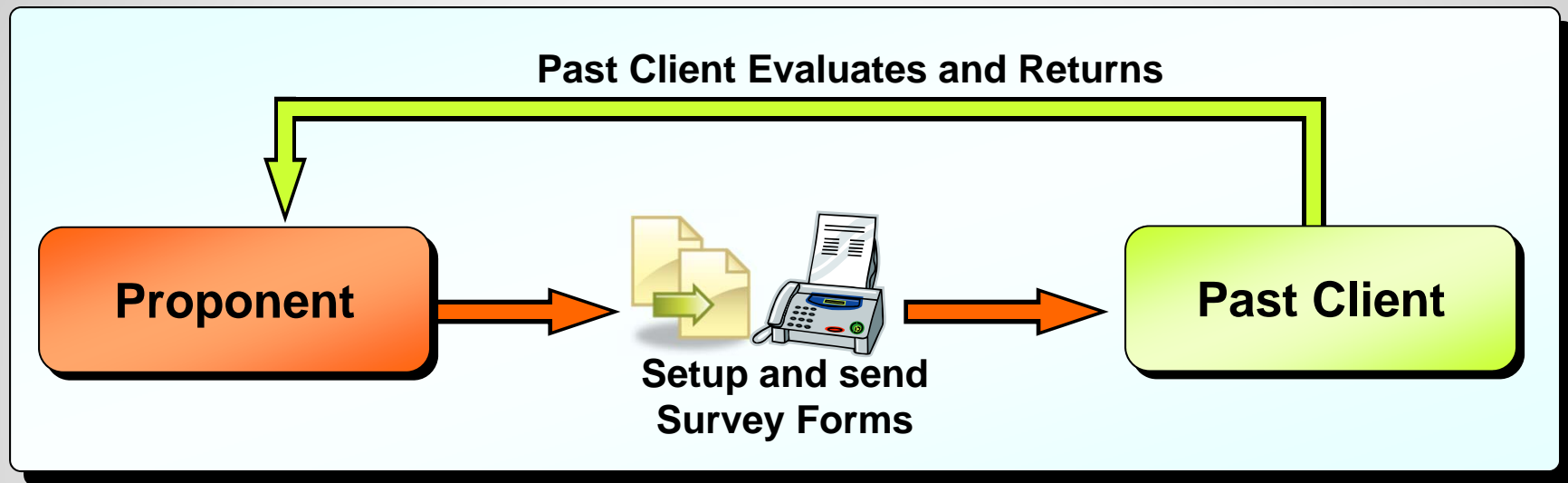
NO	CRITERIA	UNIT	
1	Ability to manage costs	(1-10)	
2	Ability to maintain schedules and respond to requests in a timely manner	(1-10)	
3	Quality of service	(1-10)	
4	Professionalism and ability to manage	(1-10)	
5	Ability to meet client expectations and to respond to address user complaints and/or unique requirements	(1-10)	
6	Ability to identify, communicate, and mitigate risk	(1-10)	
7	Ability to follow Client rules, regulations, and requirements	(1-10)	
8	Overall customer satisfaction and willingness to hire firm again	(1-10)	

Printed Name (of Evaluator) _____

Thank you

Please fax the completed survey to: Proponent fax number _____

PPI Process

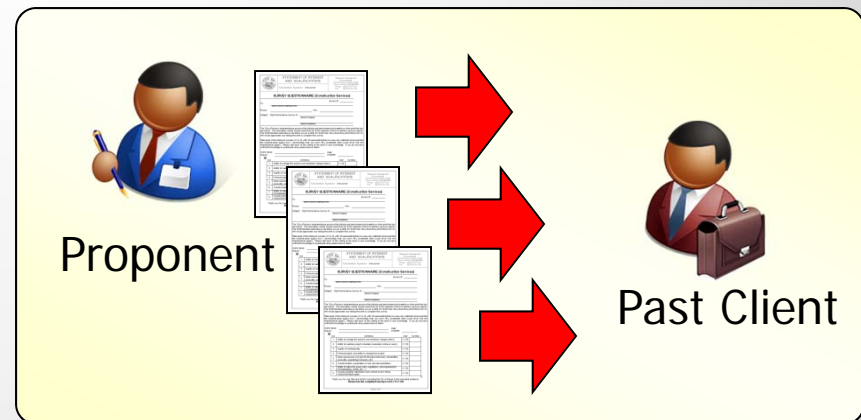
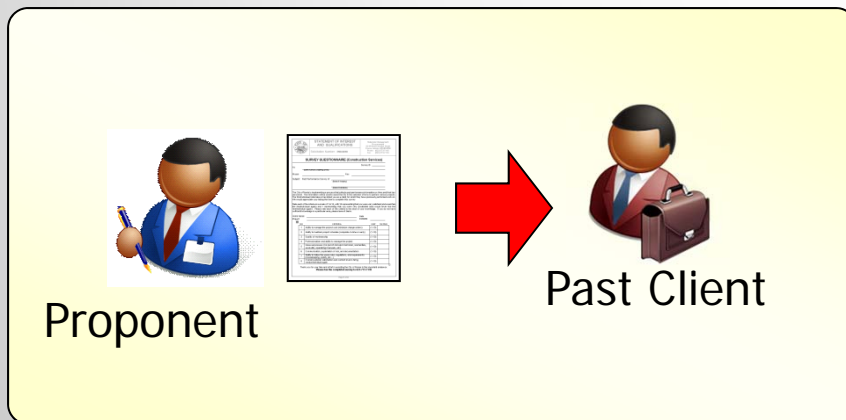


- The Proponent is responsible for sending out a survey questionnaire to each of their past clients.
- The survey must be faxed/emailed back to the Proponent
- The Proponent will submit all surveys to the Owner with their submittal.







Example Survey

(Firm and Individuals)

		Survey ID	126
To:	Jack Robertson		
	<i>(Name of person completing survey)</i>		
Phone:	623-555-5659	Fax:	623-555-5999
Subject: Past Performance Survey of:	ABC Designer Inc		
	<i>(Name of Company)</i>		
	Amy Smith (Lead Designer), John Jacobs (Lead Engineer), Brad Thompson (Civil Eng)		
	<i>(Name of Individuals)</i>		



Evaluation Criteria

Physiotherapy Criteria	Weight	Committee Rating	Numerical Value
Interviews	30		
Risk Assessment	20		
Service Capability	20		
Proposal Fee	15		
Value Added	10		
Past Performance Information	05		
Sample Treatment Status Report	P/F	-	-
Sample Invoicing Reports	P/F	-	-
Proponent Generated Solution	Optional	-	-
TOTAL	100 pts		

Pricing



**SCHEDULE "A"
PROPOSAL FEE SUMMARY FORM**

INSTRUCTIONS: Complete this Form and submit

Name of Proponent: _____

Address: _____

Phone/Fax No: _____

Fee for Initial Assessment (Physiotherapy) \$ _____ (Excluding HST)

Physiotherapy Treatment/Service	Treatment Expectation	Price (Excluding HST)
Manipulation		
Mobilization		
Whirlpool		
Neuromuscular Electrical Stimulation (NMES)		
Interferential Currents (IFC)		
Taping		
Ultrasound		
Transcutaneous electrical nerve stimulation (TENS)		
Acupuncture		
Laser Treatment		



Fee for Initial Assessment (Massage) \$ _____ (Excluding HST)

Massage Treatment/Service	Price (Excluding HST)	Session (Minutes)
		30
		45
		60
		90

Signature of Proponent

The Proponent agrees to provide ALL services requested in the Request for Proposal.

.....
Signature

.....
Email

Proponent-Generated Solution

Objective:

“how would you structure the requirements & agreement if *you* were the client”

(in order to make it best for all parties?)

- Optional
- Short narrative of your optimal solution (“blank slate”)
- NOT evaluated
 - But may ask clarifying questions during Interviews

Proponent-Generated Solution

The University is interested in:

- Capabilities to enhance the required physio services
- Alternate locations (hybrid, fully off-site)
 - Describe percent volume split between locations
 - Location accessibility for Dal students and athletes
- Resulting financial impacts / optimal financial structure
- Recommendation on contract length

Proponent-Generated Solution

Content Should:

- Clearly identify any unique or significant changes to RFP Requirements
 - Roles and Responsibilities
- Address Key Items
- Be simple & easy to read
- Figure, tables, etc. are acceptable

How to Be Successful:

- Best Value favors conservative and realistic
- Strongly recommend involving Operations Personnel

Proponent Generated Solution



SCHEDULE "T" PROONENT GENERATED SOLUTION

Use the space below to provide a narrative of the optimal service agreement to meet the needs and intent of the University (cannot exceed the 3 page limit). Clearly identify any unique or significant changes from the requirements stated in this RFP. The following components must be addressed at a minimum:

- If applicable, describe the usage and capability of alternate locations that are independent of the on-campus Dalplex space.
- If applicable, describe how utilization of alternate locations enhanced the required physiotherapy services and how service type and volume distribution is anticipated between the alternate location(s) and the Dalplex space.
- The solution must consider any financial impacts or key financial differences to the University.
- Proponents may also include a recommendation of their optimal contract length that support the most advantageous services solution to the University.

(You may delete these instructions)

Add Space as Needed (2 page maximum):

END OF SCHEDULE "T"



SCHEDULE "T" PROONENT GENERATED SOLUTION

Use the space below to provide a narrative of the optimal service agreement to meet the needs and intent of the University (cannot exceed the 3 page limit). Clearly identify any unique or significant changes from the requirements stated in this RFP. The following components must be addressed at a minimum:

- If applicable, describe the usage and capability of alternate locations that are independent of the on-campus Dalplex space.
- If applicable, describe how utilization of alternate locations enhanced the required physiotherapy services and how service type and volume distribution is anticipated between the alternate location(s) and the Dalplex space.
- The solution must consider any financial impacts or key financial differences to the University.
- Proponents may also include a recommendation of their optimal contract length that support the most advantageous services solution to the University.

(You may delete these instructions)

Add Space as Needed (2 page maximum):

Example – Bookstore Services

Financial Proposal Option A - 10 year term, with two (2) years req

Purchase Price of Current ASU Inventory \$ _____

Commission % of Revenue

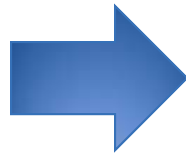
Year 1 _____ %
 Year 2 _____ %
 Year 3 _____ %
 Year 4 _____ %
 Year 5 _____ %
 Year 6 _____ %
 Year 7 _____ %
 Year 8 _____ %
 Year 9 _____ %
 Year 10 _____ %

Minimum Guaranteed Commissions

Year 1 \$ _____
 Year 2 \$ _____
 Year 3 \$ _____
 Year 4 \$ _____
 Year 5 \$ _____
 Year 6 \$ _____
 Year 7 \$ _____
 Year 8 \$ _____
 Year 9 \$ _____
 Year 10 \$ _____

Guaranteed Capital Investment

Year 1 \$ _____
 Year 2 \$ _____
 Year 3 \$ _____
 Year 4 \$ _____
 Year 5 \$ _____
 Year 6 \$ _____
 Year 7 \$ _____
 Year 8 \$ _____
 Year 9 \$ _____
 Year 10 \$ _____



Commission % of Revenue

***11.5% on gross revenue** up to \$30,000,000; plus
 13.5% on gross revenue from \$30,000,000 to \$50,000,000; plus
 15.5% on gross revenue over \$50,000,000.**

Minimum Guaranteed Commissions

Year 1 \$3,230,000
 Year 2 \$ ***
 Year 3 \$ ***
 Year 4 \$ ***
 Year 5 \$ ***
 Year 6 \$ ***
 Year 7 \$ ***
 Year 8 \$ ***
 Year 9 \$ ***
 Year 10 \$ ***

Guaranteed Capital Investment

Year 1 \$2,500,000
 Year 2 \$2,500,000
 Year 3 \$ _____
 Year 4 \$ _____
 Year 5 \$ _____
 Year 6 \$ _____
 Year 7 \$ _____
 Year 8 \$ _____
 Year 9 \$ _____
 Year 10 \$ _____

***90% of previous year's calculated commission The capital contribution will be made to coincide with occupancy of new retail space.

All other Financial Considerations (adjust/add space as needed)

\$2,213,000 -

Description: Capital investment to renovate the interior of the bookstore

\$ 250,000 -

Description: Capital investment into point-of-sale/JDA equipment

\$ 150,000 -

Description: Annual textbook scholarship

\$ 250,000 -

Description: Annual commitment to produce and distribute 36-page Alumni Catalog

\$ 80,000 -

Description: Annual commitment to reimburse school for utilities

\$ 130,000 -

Description: Budgeted annual spending for marketing and advertising

Example – Travel Management

Proponents are required to complete Option A, Option B, and Option C. Option D is optional and enables Proponents to provide an alternative pricing model. All pricing options must be in Canadian Dollars (exclusive of GST).

1.0 Price Option A: University Travel (including Group Travel, excluding Athletics Travel)

1.1 Current University Fee Model (for Travel Management Services Excluding Athletics)

1.1.1 The Proposal shall include pricing for the initial three (3) year term for Travel Management Services

Transaction	Professional Fee		
	Year 1	Year 2	Year 3
Domestic Air Tickets (include air, car & hotel)			
Trans border Air Tickets (include air, car & hotel)			
International Air Tickets (include air, car & hotel)			
Tour/Cruise Packages (include air, car & hotel)			
Car Rental Only Reservation			
Hotel Only Reservation			
Online Booking Tool Fees			
Event & Attraction Tickets <ul style="list-style-type: none"> • per person • per event 			
Frequent Flyer Redemptions			
Changes to confirmed reservation			
Visa Processing Assistance			
Customized Research			
Airline Ticket Refund			
Airline Ticket Void			
Rush In-Town Courier			
Overnight Out-of-town Courier			
U.S Destined Courier			
Lost Ticket Bond Processing Assistance			

4.1 Use the space below to provide a Narrative of the Optimal Financial Agreement to meet the base specifications and scope of services as described in the RFP (Cannot exceed Two (2) Pages). Proponents may provide this Alternative Solution for both University Travel (including Group Travel) and/or the Athletics Fee model. The alternative solution shall identify clearly as to whether there is any deviation in the pricing should Athletics not be awarded.

4.1.1 At a minimum, Proponents must address the following in their Price Option D submission:

- .1 Pricing Structure for all Travel Management Services (may or may not include Athletics Travel)
- .2 Optimal Contract Length
- .3 Identify any significant changes to roles and responsibilities that are different from the traditional model provided in the Scope of Services.

Add Space as Needed (2 page maximum):

Example – Travel Management

Proponents are required to complete Option A, Option B, and Option C. Option D is optional and enables Proponents to provide an alternative pricing model. All pricing options must be in Canadian dollars.

4.1 Use the space below to provide a Narrative of the Optimal Financial Agreement to meet the base specifications and scope of services as described in the RFP (Cannot exceed 2000 words). Proponents must submit this Alternative Solution for both the University of Alberta and the University of Saskatchewan.

1.0 Price Option A: Univer

1.1 Current University Fee I

1.1.1 The Proposal Management S

Transaction
Domestic Air Tickets (i air, car & hotel)
Trans border Air Ticket (include air, car & hote
International Air Ticket (include air, car & hote
Touri/Cruise Packages air, car & hotel)
Car Rental Only Reser
Hotel Only Reservator
Online Booking Tool F
Event & Attraction Tick <ul style="list-style-type: none"> • per person • per event
Frequent Flyer Redem
Changes to confirmed reservation
Visa Processing Assist
Customized Research
Airline Ticket Refund
Airline Ticket Void
Rush In-Town Courier
Overnight Out-of-town
U.S Destined Courier
Lost Ticket Bond Procc
Assistance

Maritime Travel will provide a full range of corporate travel services to the University of Alberta through a central, dedicated team of Maritime Travel counsellors (the "U of A Travel Team"). The U of A Travel Team size and composition will be mutually agreed between the parties based on a forecast of the U of A travel activity and the core staffing recommended by Maritime Travel as necessary to handle the estimated number of transactions. This team can be housed either within Maritime's offices or onsite at the U of A.

Maritime Travel will also provide designated U of A employees with access to a proprietary, web based, travel reservation product (the "Online Booking Tool") to enable individuals wishing to book travel directly to use that self-service capability.

During the contract, the U of A will pay Maritime Travel:

1. A "Transaction Fee" of \$5.00 for each Online Transaction processed using the Online Booking Tool;
2. A "Transaction Fee" of \$12.00 for each full service Transaction processed during the month;
3. The wages and related benefit costs for dedicated U of A travel counsellors on the U of A team;
4. Back-up charges for other agents required to provide additional support to the dedicated U of A travel team as required, including groups support;
5. Account management services at \$1,500 per month;
6. After hours helpline at \$10 per call; and
7. A 15% management fee applied to expense items 3 through 6.

Maritime Travel will credit the U of A to reduce the monthly invoice payable for the following amounts related to U of A travellers:

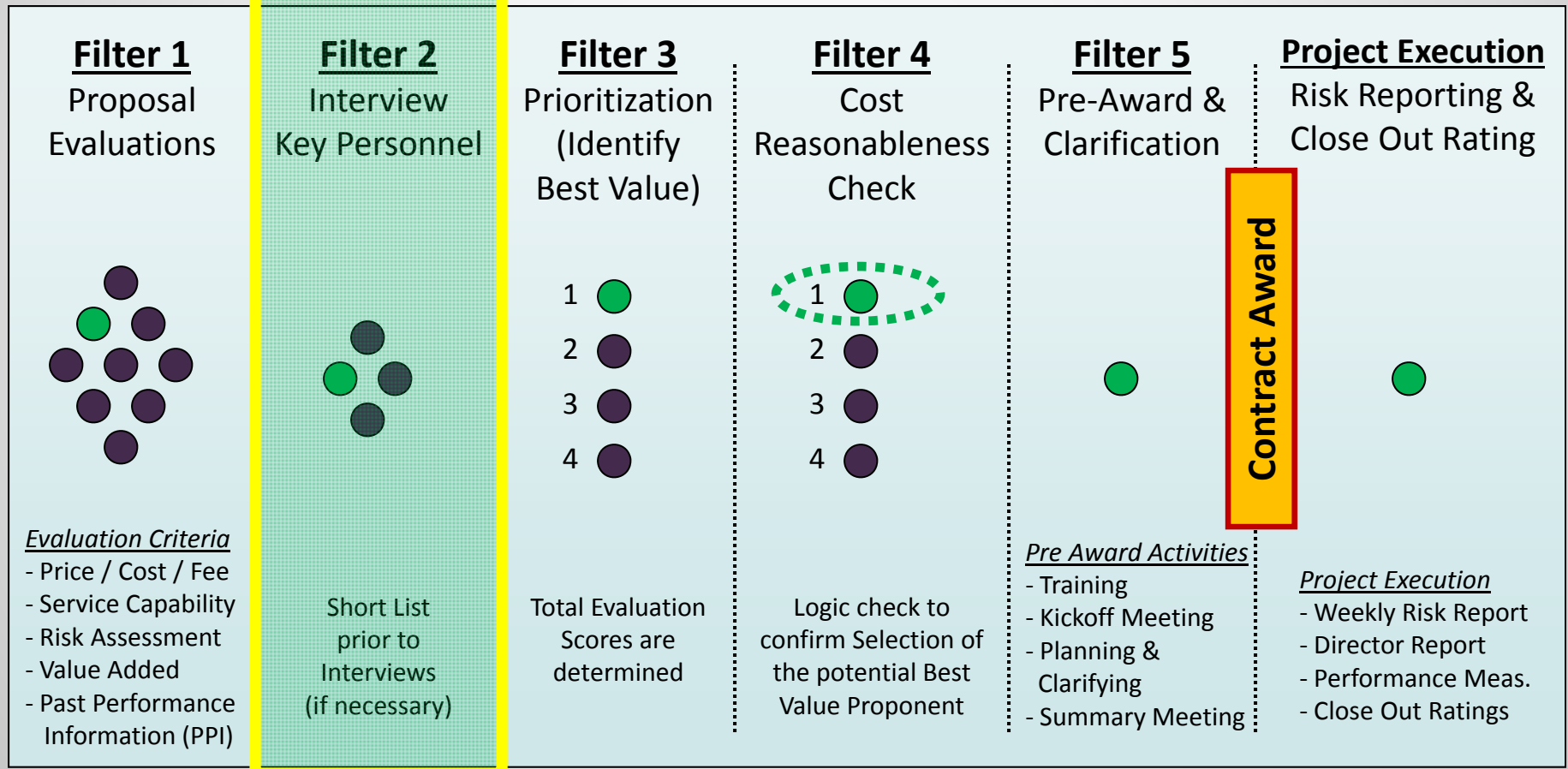
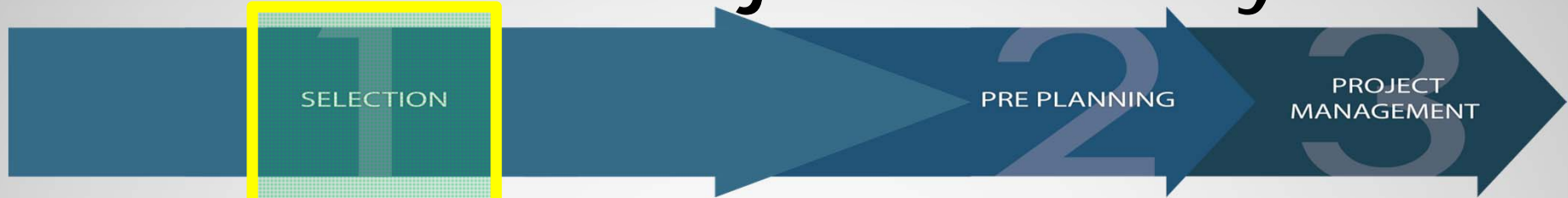
8. Airline commissions earned at the point of reservation;
9. Guaranteed overrides paid by airlines, including both the monthly guarantee and a la carte components paid by Air Canada;
10. Hotel and car commissions; and

University native solution uld Athletics

e Option D or may not

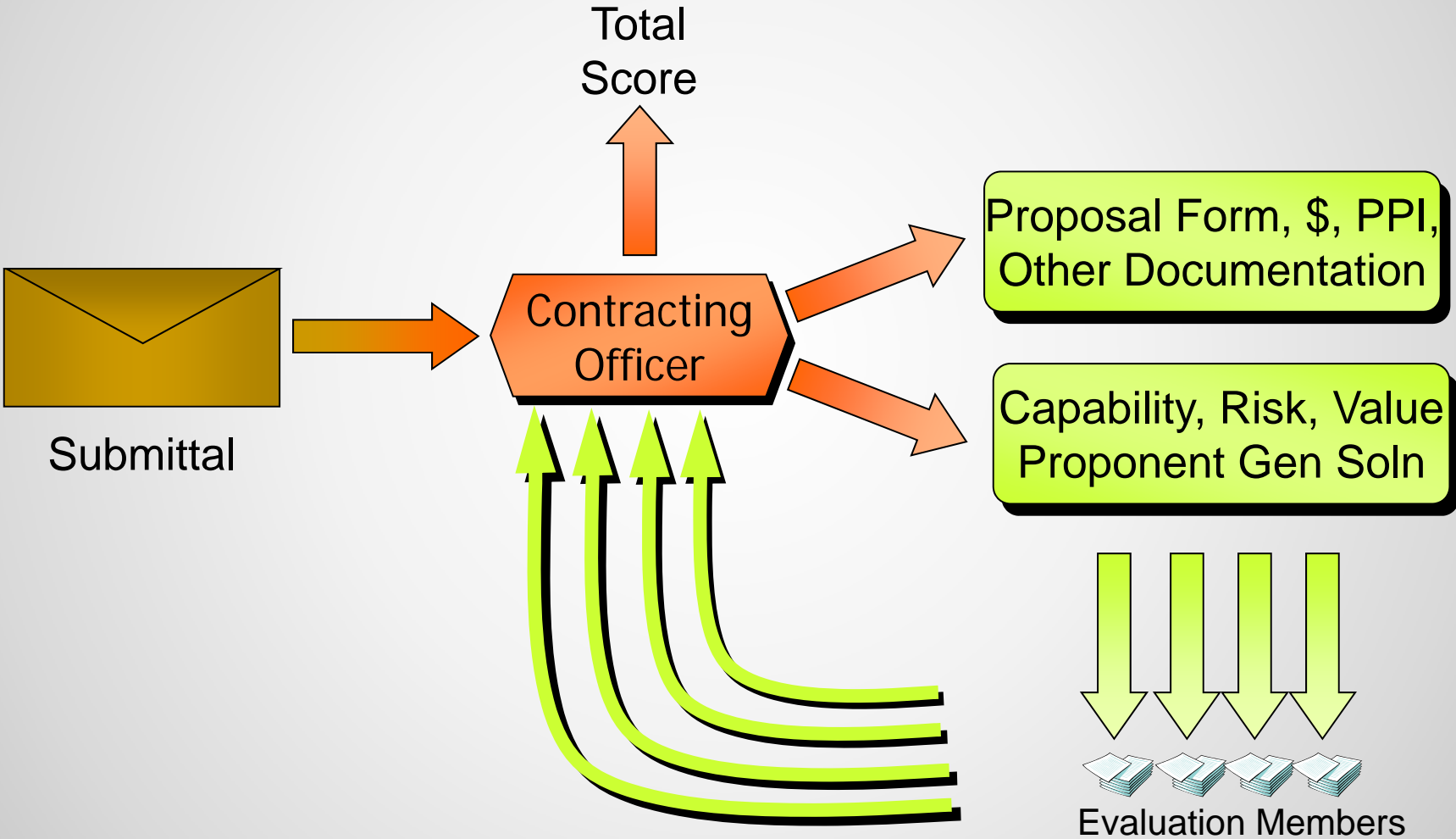
i that are f Services.

Value Based Project Delivery



Contract Award

The Evaluation Process



Shortlisting

- If necessary short listing will be conducted prior to interviews
- Interviews:
 - Account Manager
 - Lead Therapist

Interview Format



- Q&A Interview, NOT a presentation
- Individuals will be interviewed separately.
- A standard set of questions will be generated and asked to each individual.
- Typically interview times will last about 15-30 minutes per individual
- No substitutions will be allowed.

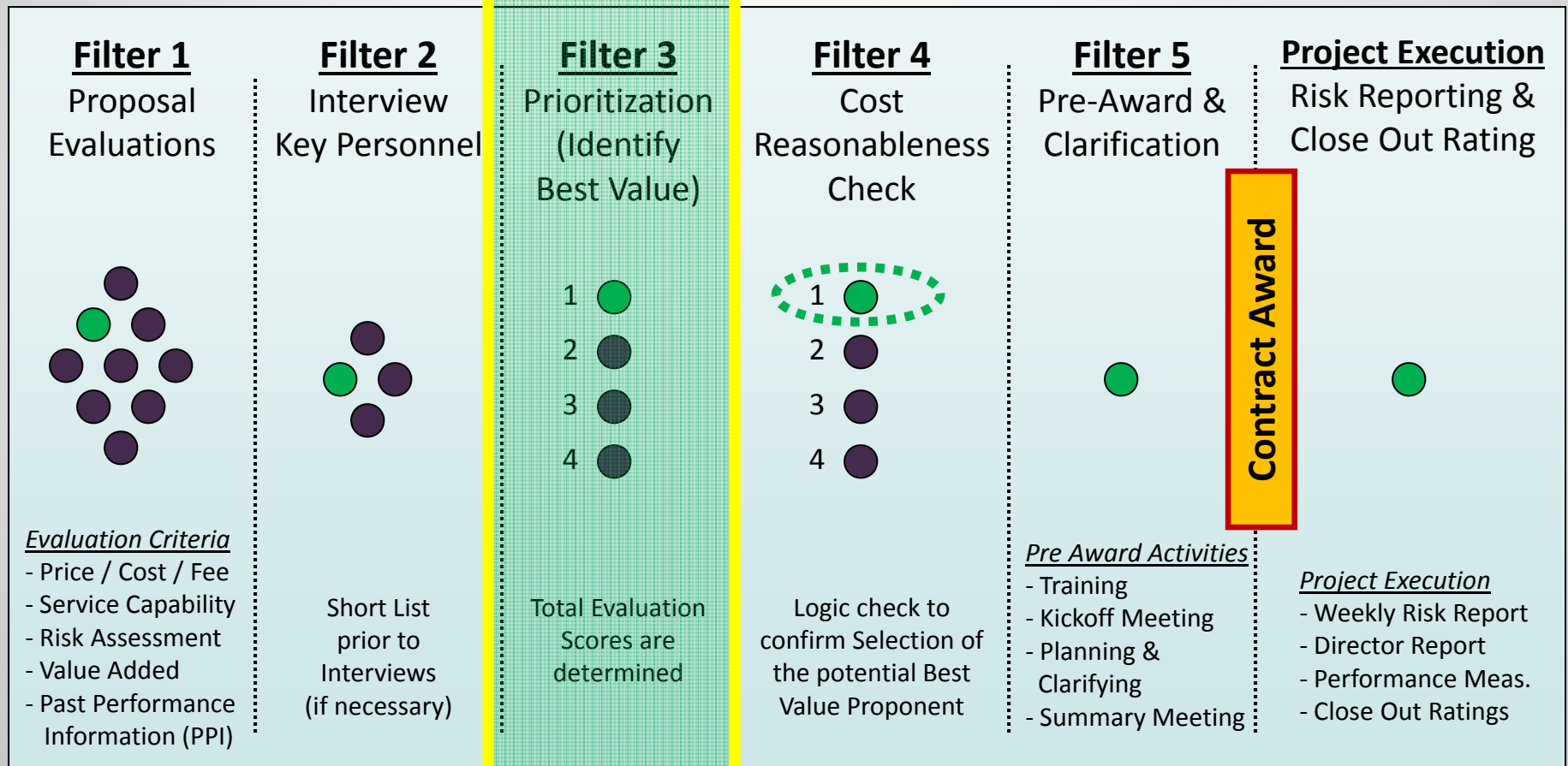
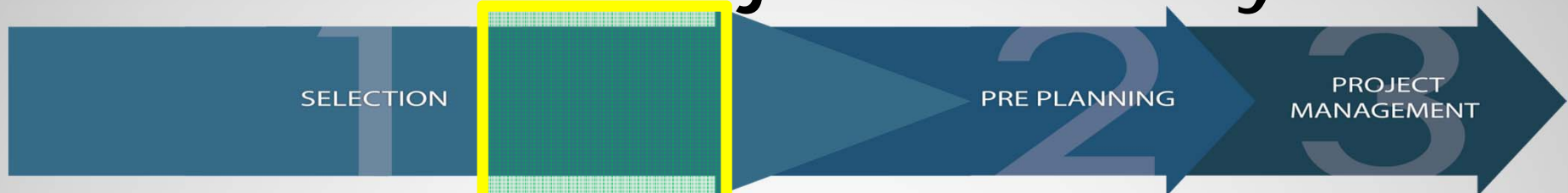
Best Value Interviews:

Identifying Expertise

Examples of questions asked:

1. Why were you selected for this project?
2. Please describe your relevant work experience and expertise (certifications, skill sets, etc.) and how this relates to the University's Requirements.
3. What is different about this project from other projects that you have worked for?
4. Draw out the annual service plan for this project by major milestone activities. (transition, service delivery)
 1. Identify, prioritize, and how you will minimize the risks of this project.
 2. What risks don't you control? How will you minimize those risks?
 3. What do you need from the client and when do you need it?
5. What value do you bring to the project in terms of differences based on dollars, quality, expertise, or time?
6. Other questions regarding the RFP requirements

Value Based Project Delivery

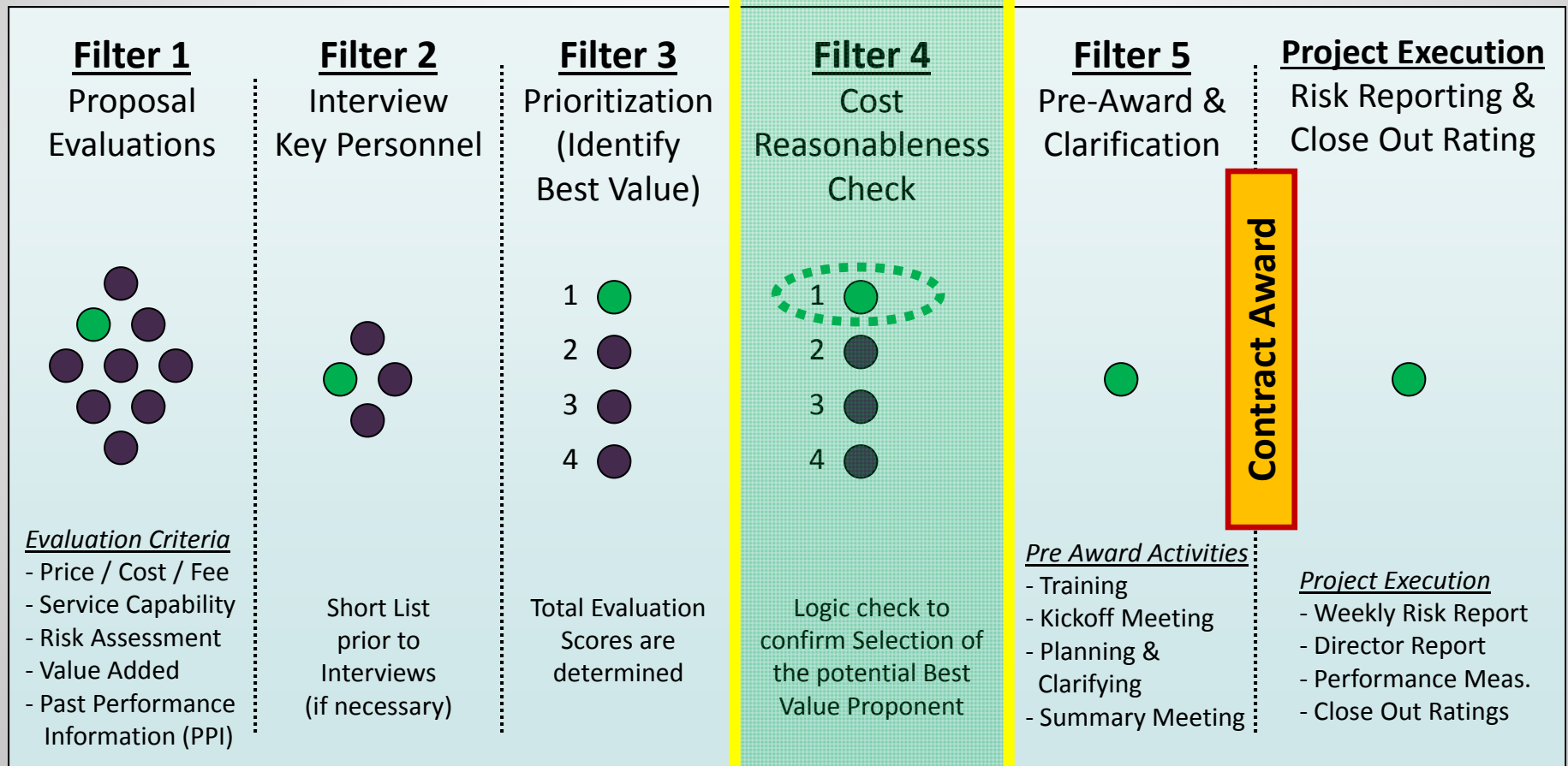
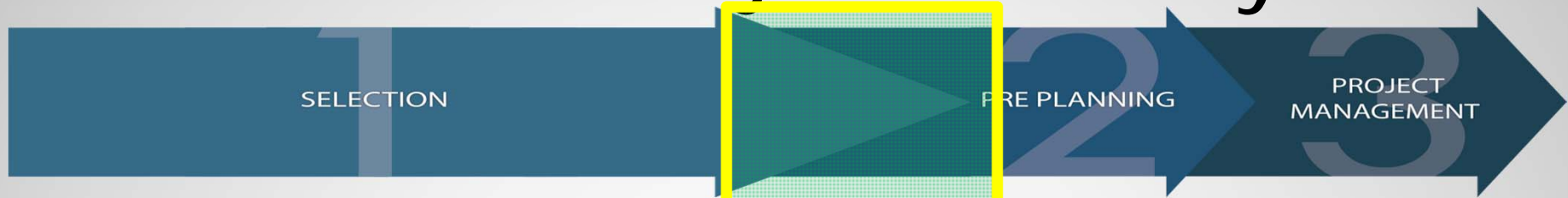


Contract Award

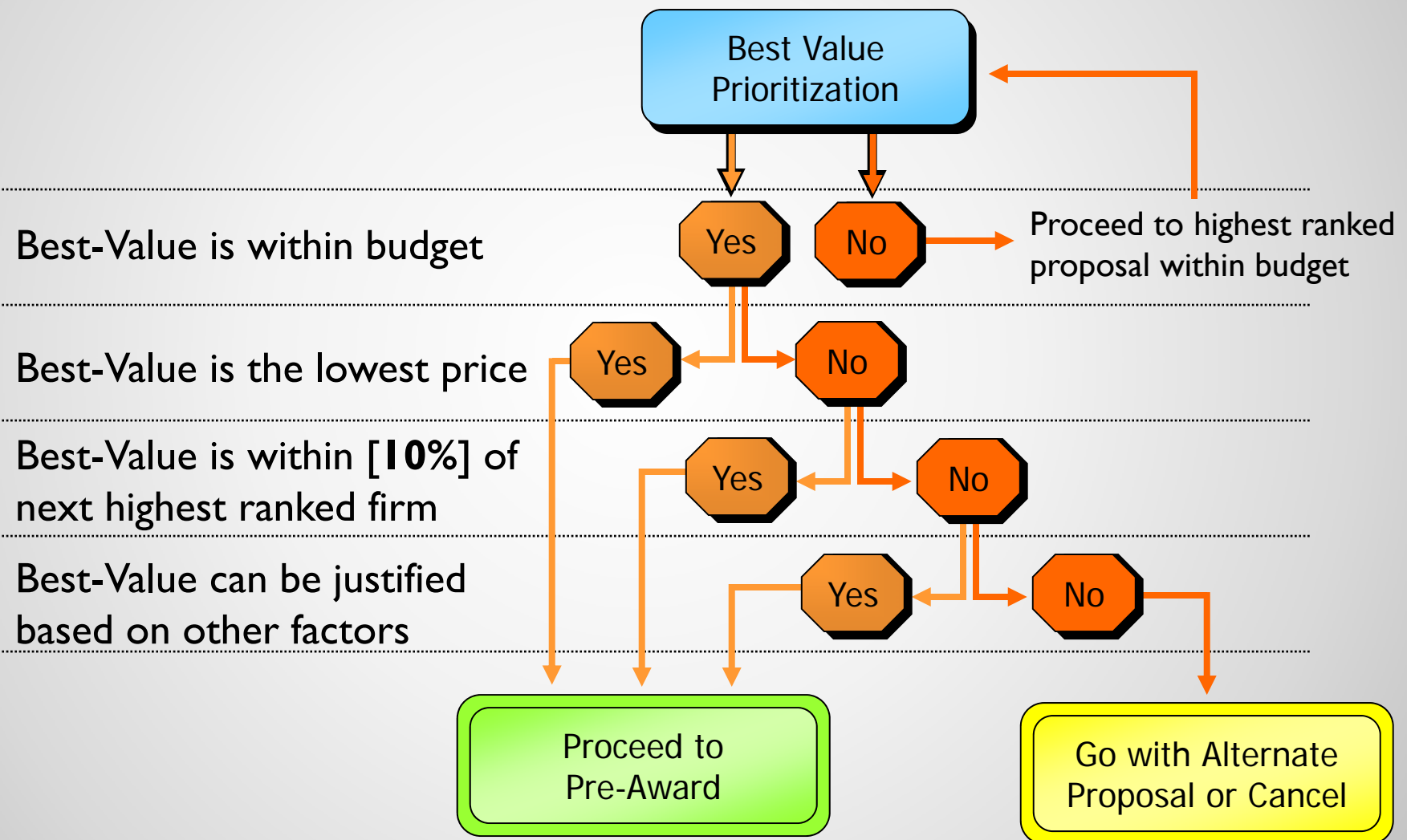
Simple Scoring Methodology

NO	CRITERIA	WEIGHTS	RAW DATA			FINAL POINTS		
			Vendor A	Vendor B	Vendor C	Vendor A	Vendor B	Vendor C
1	Proposal Cost	250	\$ 57,000	\$ 65,000	\$ 55,000	241	212	250
2	Interview Rating	350	8.5	5.1	5.1	350	210	210
3	NTR Rating	150	9.5	6.5	5.1	150	103	81
4	TC Rating	100	9.1	9.5	9.9	92	96	100
5	VA Rating	100	5.0	8.5	5.0	59	100	59
6	PPI Rating	50	9.8	9.8	9.9	49	49	50
						941	770	749

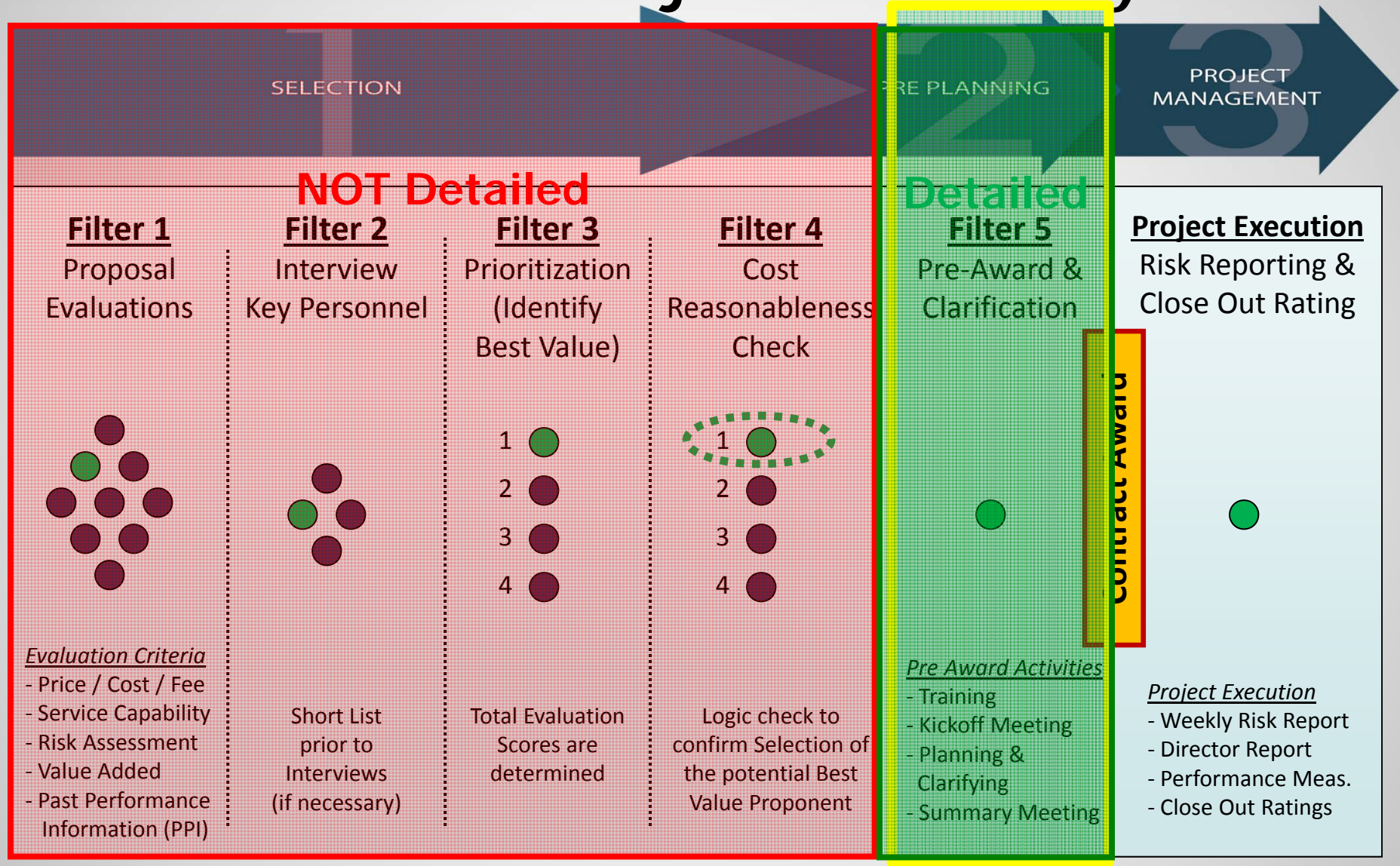
Value Based Project Delivery



Dominance Check & Cost Reasonableness



Value Based Project Delivery

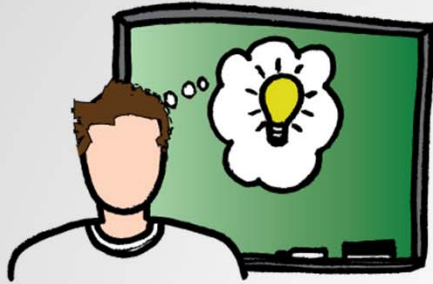


Pre-Award Clarification

What the Vendor Does:

- Presents their Optimal Plan
 - Clarify that it's accurate & set the expectation for *how* you will execute
 - Coordinate the milestone schedule
- Identifies Project Risks
 - Set plans to minimize those risks from occurring
 - Address any Owner concerns
 - Clarify assumptions & "known unknowns"
- Identifies what support they need from the Owner (or others)
 - Coordinate & establish how you'll get the support you need
 - Could be: info, access, decisions, reviews, etc.

Clarification / Preplanning Period



1 Pre Award Education



2 Kickoff Meeting



3 Plan & Coordinate Deliverables



4 Insert Deliverables Into Contract

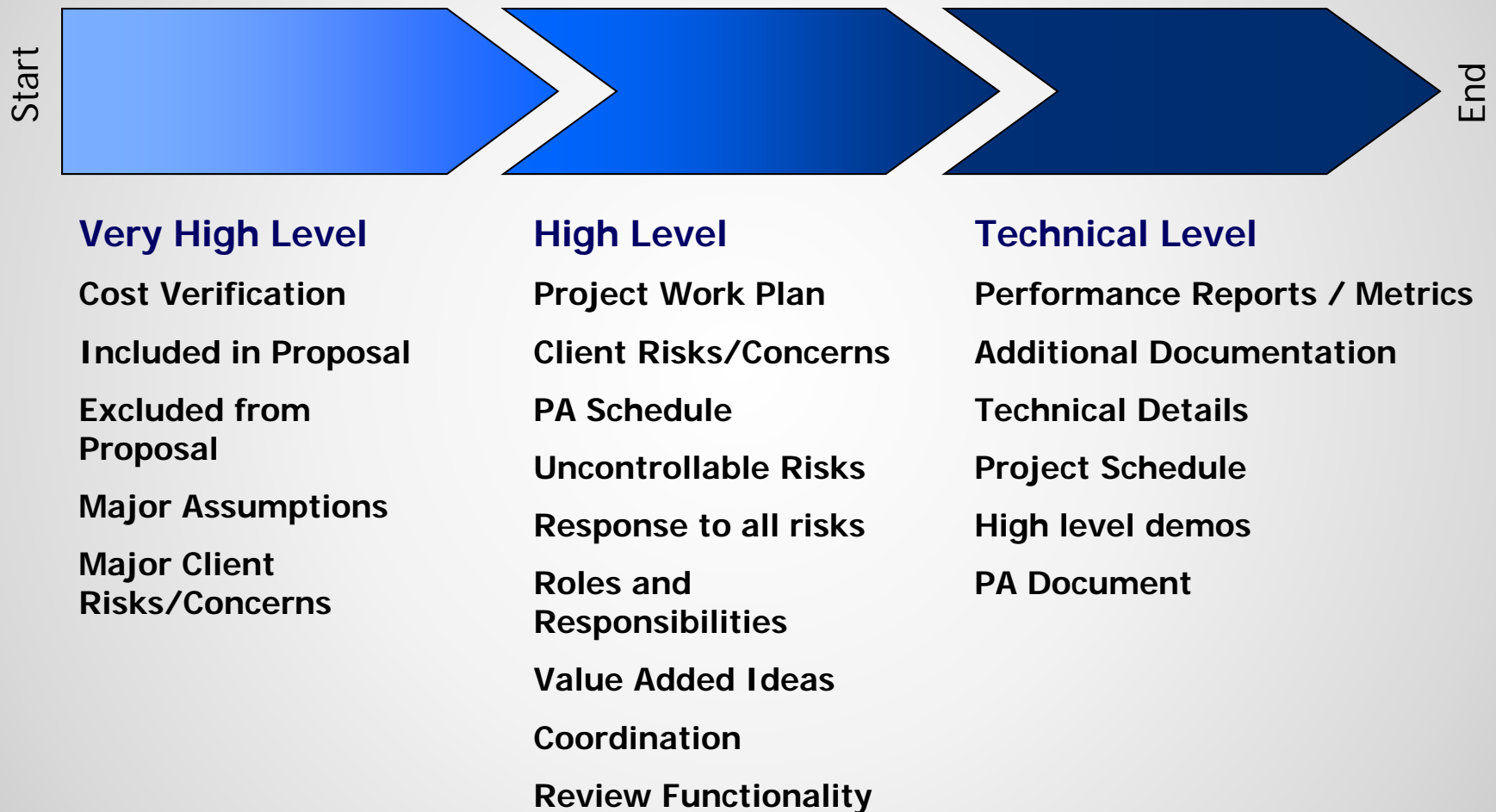


5 Summary Meeting



6 Contract Signed

Clarification / Preplanning Period



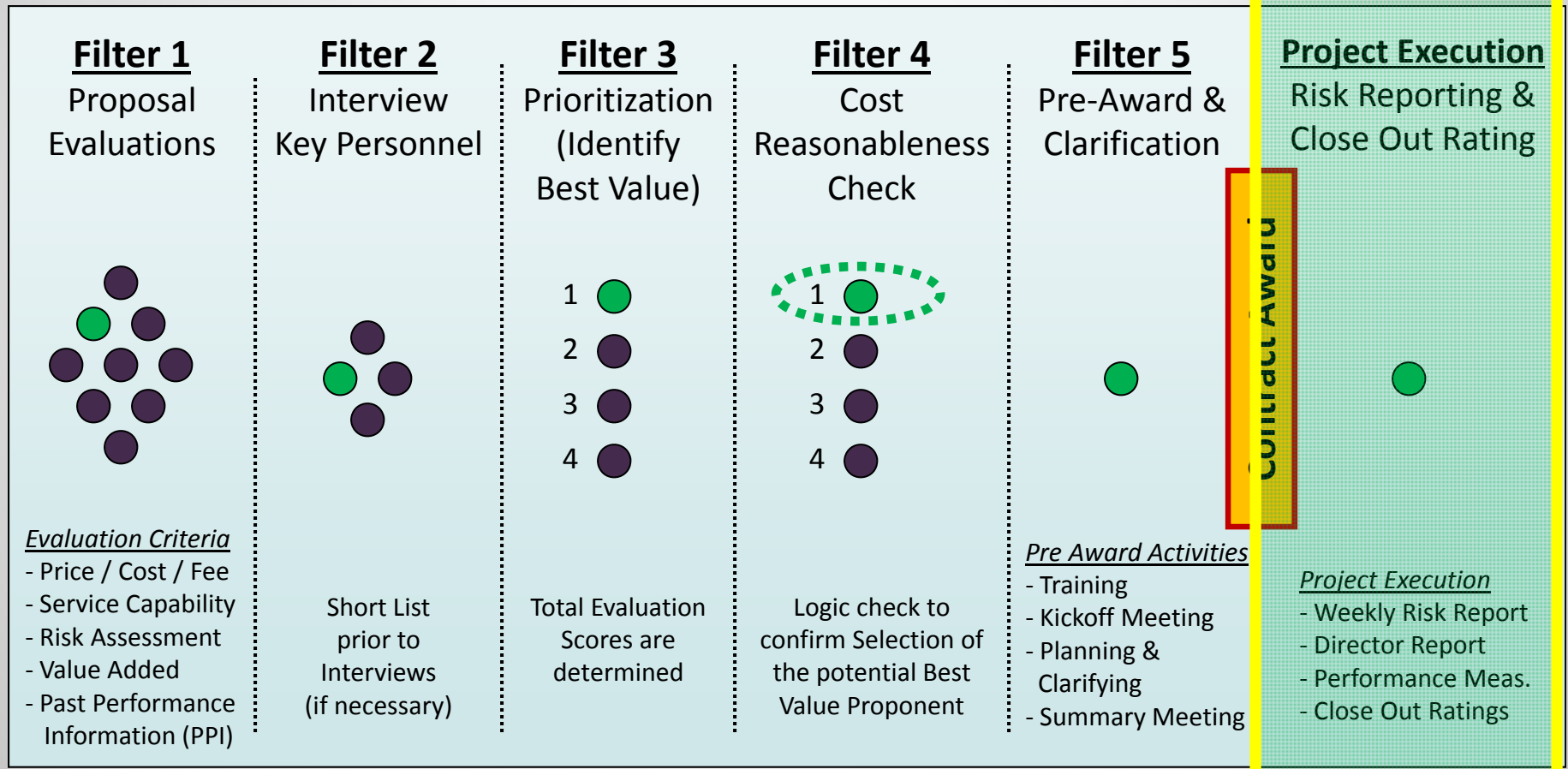
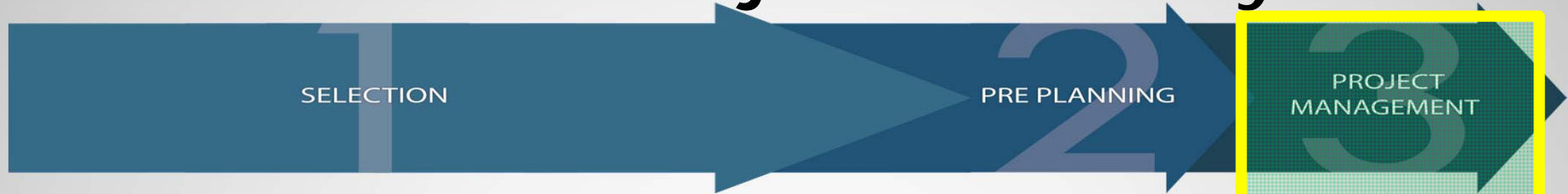
Kickoff Meeting Agenda

- Vendor runs the meeting
 - Review plan in detail
 - Milestone schedule
 - Address client concerns (if given)
 - Address your risks and unknowns (it is ok not to know things, but need to know when you will know and what could happen along the way)
 - Have day-by-day schedule for clarification period
- Outcome:
 - Coordinate pre-planning schedule
 - List of requested activities for the Client team
- Move forward

Summary Meeting Agenda

- Not a “Q&A” meeting
 - All issues resolved
 - All coordination complete
 - All risks that are not in vendors control have been identified
 - All value added options have been addressed
- PA Summary Meeting is to summarize all of the coordination that has been complete and walk through the PA Document/RMP
- Upon successful completion of the PA Summary Meeting, the client will make the award

Value Based Project Delivery



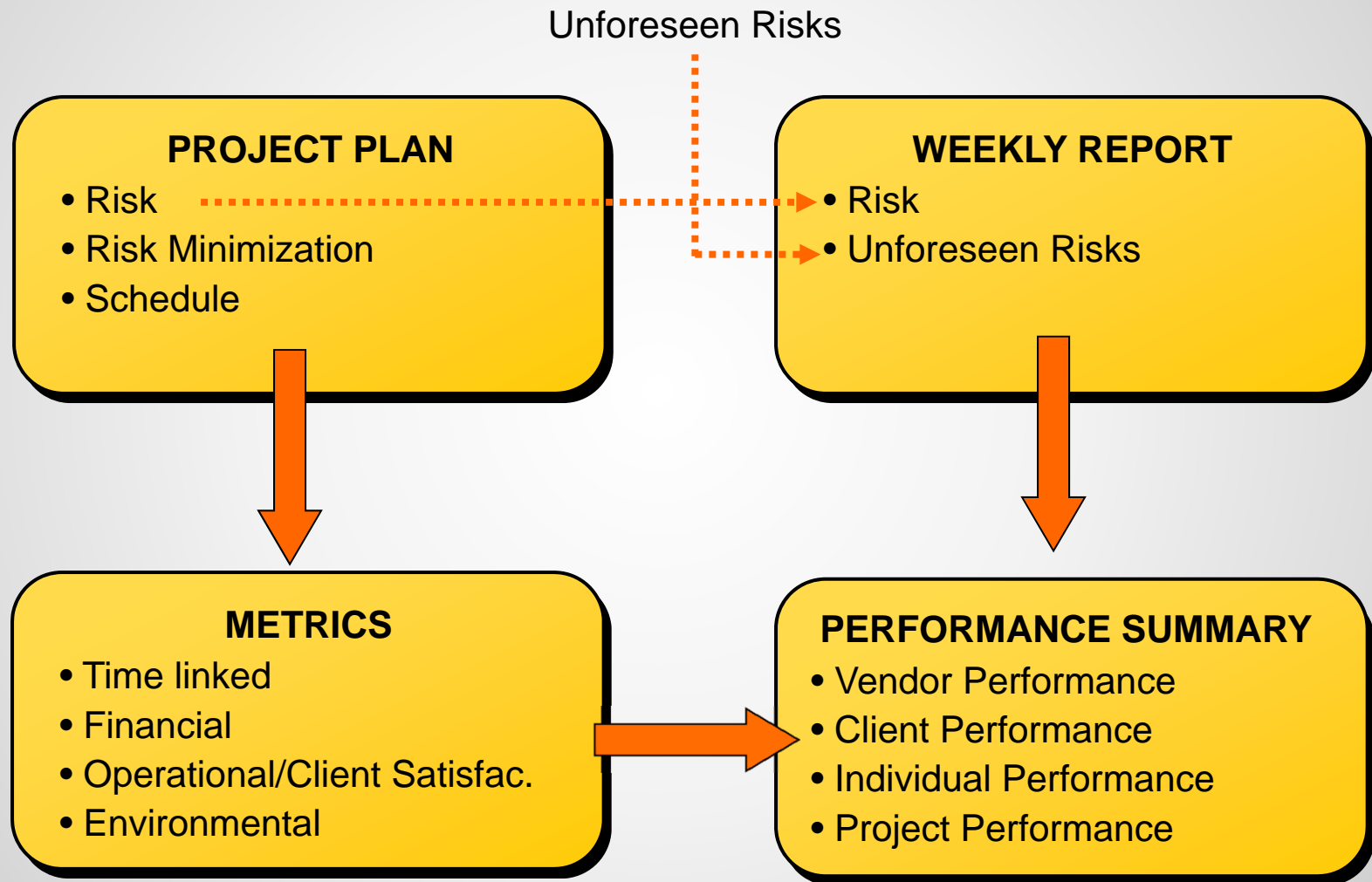
CONTRACT AWARD

Weekly Risk Report

- Excel Spreadsheet that tracks risks and impacts
- Client will setup and send to vendor once the Award is issued. ASU will provide additional training.
- The final project rating will be impacted by the accuracy and timely submittal of the WRR

No	Date Entered	Risk Items	Plan to Minimize Risk	Planned Resolution Date	Actual Date Resolved	Impact Days to Critical Path	Impact to Cost	Owner/ Contractor Generated	Satisfaction Rating (1-10)
0	3/17/2006	EXAMPLE: Risk A	Risk A Plan: 1) Problem background - why is this an unexpected project risk? 2) What will be done to minimize this? 3) Who is responsible for the plan? 4) What kind of impact will this have?	9/9/2006		75	\$ 10,000	0	5
1									
2									
3									

Measurement of Deviation from the Expectation Management by Risk Minimization



Questions?



TARGET PROCUREMENT SCHEDULE

RFP Release Date	25-Jan-2014
Pre-Proposal Information Session (for prospective Proponents)	30-Jan-2014
RFP Closing Date	24-Feb-2014
Notify Proponents of Interview Schedule (short listed if necessary)	5-Mar-2014
Interviews of Proponents' Key Project Personnel	12-Mar-2014
Selection of Potential Best Value Proponent	14-Mar-2014
Pre-Award Kick Off Meeting	20-Mar-2014
Duration of Pre-Award Planning Activities	2 weeks
Pre-Award Summary Meeting	4-Apr-2014
Target Contract Award Date	7-Apr-2014
Commencement of Services	1-May-2014