



**DEPARTMENT OF FINANCE
PROCUREMENT SERVICES**

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REQUEST FOR EXPRESSION OF INTEREST (RFEOI) # 4219

Lean Six Sigma Mentoring

The Department of Transportation, Infrastructure and Energy is seeking Proponents with the expertise of a Black Belt Certified Process Improvement Consultant to mentor existing Lean Six Sigma trained staff. The services of the Black Belt Certified Process Improvement Consultant will be required for the completion of one Lean Six Sigma improvement project.

Sponsored by the
Department of Transportation, Infrastructure and Energy

Links to Online Documents

The Proponent should use the following online documents when preparing its proposal:

- Standard Terms and Conditions:
<http://www.cap-cpma.ca/images/worddocuments/newatlantic-e.htm>

Important Notes for Submitting a Proposal:

- The complete Request for Expression of Interest document (18 pages) is comprised of the 'Prince Edward Island Expression of Interest (PEIRFEOI) Form (2 pages) and this RFEOI specifications document (16 pages). In the file that is downloaded from our PEI Tender Website, the PEIRFEOI Form **always precedes** this RFEOI specifications document. Please contact Procurement Services if any pages are missing.
- Financial information must **not** be reflected on the PEIRFEOI Form.
- The proposal must be submitted in **paper form** at the address given above. Any proposal that is submitted via facsimile or electronic mail **will not** be accepted.

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1.1 Definitions

Throughout this Request for Expression of Interest, the following definitions apply:

- a) “Request for Expression of Interest RFEOI Government Contact Persons” means those persons designated by Government listed under section 2.5 of this RFEOI to be the contact persons on behalf of Government for all matters relating to this RFEOI;
- b) “must”, or “mandatory” means a requirement that must be met in order for a proposal to receive consideration;
- c) “PEIRFEOI Form” means the first two pages which precedes the “RFEOI specification document”;
- d) “PEI Tender Website” means www.gov.pe.ca/tenders;
- e) “Proponent” means an individual or a company that submits, or intends to submit, a proposal in response to this Request for Expression of Interest;
- f) “Proposal” or “proposal” means a response to this RFEOI submitted to the Province by a Proponent;
- g) “Province” or “Government” means the Government of Prince Edward Island and includes the Minister;
- h) “Request for Expression of Interest” or “RFEOI” means the process described in the contents of this proposal;
- i) “should” or “desirable” means a requirement having a significant degree of importance to the objectives of the Request for Expression of Interest.

1.2 Terms and Conditions

The following terms and conditions will apply to this Request for Expression of Interest. Submission of a proposal in response to this Request for Expression of Interest indicates acceptance of all the terms that follow and that are included in any addenda issued by the Province. Provisions in proposals that contradict any of the terms of this Request for Expression of Interest will be as if not written and do not exist.

1.3 Additional Information Regarding the Request for Expression of Interest

All subsequent information regarding this Request for Expression of Interest, including changes made to this RFEOI will be posted on the PEI Tender Website. It is the sole responsibility of the Proponent to check for amendments on the PEI Tender Website.

1.4 Late Proposals

Proposals will be marked with their receipt time at the closing location. Only complete proposals received and marked before closing time will be considered to have been received on time. Closing time and closing location for this RFEOI are available on the PEI Tender Website. Hard copies of late proposals will not be accepted and will be returned to the Proponent. In the event of a dispute, the proposal receipt time as recorded at the closing location shall prevail whether accurate or not.

1.5 Eligibility

Proposals will not be evaluated if the Proponent’s current or past corporate or other Interests may, in the Province’s opinion, give rise to a conflict of interest in connection with the project described in this Request for Expression of Interest. This includes, but is not limited to, involvement by a Proponent in the preparation of this Request for Expression of Interest. If a Proponent is in doubt as

to whether there might be a conflict of interest, the Proponent should consult with the Government Contact Persons prior to submitting a proposal.

1.6 Evaluation

Evaluation of proposals will be by a committee formed by the Province. All committee members will be bound by the same standards of confidentiality.

1.7 Request for Expression of Interest Debriefing

At the conclusion of the Request for Expression of Interest process, all Proponents will be notified. Unsuccessful Proponents may request a debriefing meeting with the Province.

1.8 Changes to Proposals

By submission of a clear and detailed written notice, the Proponent may amend or withdraw its proposal prior to the closing date and time as stated on the PEI Tender Website. Upon closing time, all proposals become irrevocable. The Proponent will not change the wording of its proposal after closing and no words or comments will be added to the proposal unless requested by the Province for purposes of clarification.

1.9 Proponents' Expenses

Proponents are solely responsible for their own expenses in preparing a proposal and for subsequent negotiations with the Province, if any. If the Province elects to reject all proposals, the Province will not be liable to any Proponent for any claims, whether for costs or damages incurred by the Proponent in preparing the proposal, loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

1.10 Limitation of Damages

Further to the preceding paragraph, the Proponent, by submitting a proposal, agrees that it will not claim damages, for whatever reason, relating to the RFEOI, the Contract or in respect of the competitive process, in excess of an amount equivalent to the reasonable costs incurred by the Proponent in preparing its proposal and the Proponent, by submitting a proposal, waives any claim for loss of profits if no Contract is made with the Proponent.

1.11 Proposal Validity

Proposals will be open for acceptance for at least 60 days after the closing date as stated on the PEI Tender Website.

1.12 Currency and Taxes

Prices quoted are to be:

- a) In Canadian dollars;
- b) Inclusive of duty, where applicable; FOB destination, delivery charges included where applicable; and
- c) Exclusive of applicable taxes.

1.13 Completeness of Proposal

By submission of a proposal the Proponent warrants that, if this Request for Expression of Interest is to design, create or provide a system or manage a program, all components required to run the system or manage the program have been identified in the proposal or will be provided by the Proponent at no charge.

1.14 Sub-Contracting

1.14.1 For the purposes of this RFEOI, the use of a sub-contractor will not be permitted.

1.15 Acceptance of Proposals

1.15.1 This Request for Expression of Interest should not be construed as an agreement to purchase goods or services. The Province is not bound to enter into a Contract with the Proponent who submits the lowest priced proposal or with any Proponent. The Province will be under no obligation to receive further information, whether written or oral, from any Proponent.

1.15.2 Neither acceptance of a proposal nor execution of a Contract will constitute approval of any activity or development contemplated in any proposal that requires any approval, permit or license pursuant to any federal or provincial statute, regulation or municipal by-law.

1.16 Liability for Errors

While the Province has used considerable efforts to ensure information in this Request for Expression of Interest is accurate, the information contained in this Request for Expression of Interest is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the Province, nor is it necessarily comprehensive or exhaustive. Nothing in this Request for Expression of Interest is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in this Request for Expression of Interest.

1.17 Modification of Terms

The Province reserves the right to modify or cancel the terms of this Request for Expression of Interest at any time prior to the closing date and time in its sole discretion and has the right to cancel this Request for Expression of Interest at any time prior to entering into a Contract with the successful Proponent.

1.18 Ownership of Proposals

All proposals submitted to the Province become the property of the Province. They will be received and held in confidence by the Province, subject to the provisions of the *Freedom of Information and Protection of Privacy Act* http://www.gov.pe.ca/law/statutes/pdf/f-15_01.pdf and this Request for Expression of Interest.

1.19 Use of Request for Expression of Interest

Any portion of this RFEOI, or any information supplied by the Province in relation to this Request for Expression of Interest may not be used or disclosed, for any purpose other than for the submission of proposals. Without limiting the generality of the foregoing, by submission of a proposal, the Proponent agrees to hold in confidence all information supplied by the Province in relation to this Request for Expression of Interest subject to *Freedom of Information and Protection of Privacy Act*, http://www.gov.pe.ca/law/statutes/pdf/f-15_01.pdf

1.20 Reciprocity

The Province may consider and evaluate any proposals from other jurisdictions on the same basis that the government purchasing authorities in those jurisdictions would treat a similar proposal from a supplier of the Province.

1.21 No Lobbying

Proponents must not attempt to communicate directly or indirectly with any employee, contractor or representative of the Province, including the evaluation committee and any elected officials of the Province, or with members of the public or the media, about the project described in this Request for Expression of Interest or otherwise in respect of the Request for Expression of Interest, other than as expressly directed or permitted by the Province.

1.22 Collection and Use of Personal Information

Proponents are solely responsible for familiarizing themselves, and ensuring that they comply, with the laws applicable to the collection and dissemination of information, including resumes and other personal information concerning employees and employees of any subcontractors. If this RFEOI requires Proponents to provide the Province with personal information of employees who have been included as resources in response to this RFEOI, Proponents will ensure that they have obtained written consent from each of those employees before forwarding such personal information to the Province. Such written consents are to specify that the personal information may be forwarded to the Province for the purposes of responding to this RFEOI and use by the Province for the purposes set out in the RFEOI. The Province may, at any time, request the original consents or copies of the original consents from Proponents, and upon such request being made, Proponents will immediately supply such originals or copies to the Province.

2.0 Introduction

The Department of Transportation, Infrastructure and Energy is seeking Proponents with the expertise of a Black Belt Certified Process Improvement Consultant to mentor existing Lean Six Sigma trained staff. The services of the Black Belt Certified Process Improvement Consultant will be required for the completion of one Lean Six Sigma improvement project.

While this RFEOI has identified the Department of Transportation, Infrastructure and Energy as the project home, the staff to be mentored reside within the Department of Economic Development and Tourism.

2.1 Government Responsibility

The mandate of the Prince Edward Island Department of Transportation, Infrastructure and Energy is to contribute to economic development and the quality of life in Prince Edward Island by maintaining and enhancing, in an affordable way, the essential transportation systems and the services for the efficient and safe movement of people, goods, and services.

It is also necessary to provide the infrastructure for the efficient conduct of government through services to other government departments in the areas of building construction, crown land management, building maintenance and accommodations.

Clients include transportation users, enforcement agencies, the construction industry and other government departments.

The Department of Transportation, Infrastructure and Energy is also responsible for Access PEI, a one-stop location to obtain provincial government programs, services and information. There are eight Access PEI sites throughout the Province. Islanders can obtain a wide range of programs and services including paying property tax, obtaining a drivers license or purchasing a fishing license.

2.2 Situation Overview

In supporting the above priorities, the Lean Six Sigma project will focus on a joint initiative of the divisions of Highway Safety and Access PEI, of the Department of Transportation, Infrastructure and Energy, to improve client satisfaction and program/service delivery efficacy.

The department seeks to improve capacity to conduct system process reviews which include; understanding stakeholder points of view, recognizing tangible and intangible value, determining metrics, process mapping and investment evaluation. The mentorship of existing Lean Six Sigma trained staff will result in the development of internal capacity in Lean Six Sigma allowing Government to undertake future Lean Six Sigma projects.

2.3 RFEOI Objectives and Project Scopes

The Department is seeking mentorship and consultant services in project implementation for both the project sponsor and project lead. The components may include; staff engagement exercises, provision of supporting tools and templates, leadership, project selection meetings, project management and system transformation support.

The individuals receiving mentorship have received initial training in Lean/Six Sigma yellow and green belts, respectively, and require mentorship as they begin their initial process improvement project. Mentorship is required for project selection to align with the departments strategic goal and priorities as well as project implementation and evaluation.

This Lean Six Sigma project is to follow the DMAIC process (define, measure, analyze, improve and control).

- Define and determine defects and areas of waste;
- Measure current baseline service delivery metrics;
- Analyze the defects to determine the root cause;
- Improve the process by brainstorming solutions and improvements and to test them for defects; and to
- Control the new process by embedding a new and improved process to decrease potential of reverting old habits/ways of doing things.

2.4 Government Contact Persons

2.4.1 Questions about this RFEOI should be directed to the individuals listed below (the “Government Contact Persons”), or their designate(s). Information that is obtained from any other source is not official and may be inaccurate.

For Department	For Procurement Services
Jane Mallard	Ian Burge
Director, Policy and Strategy	Manager, Procurement Services
Department of Economic Development and Tourism	Procurement Services
105 Rochford Street, 5th Floor Shaw Bldg	95 Rochford Street, Second Floor Shaw Building South, Room 27
P.O. Box 2000	P.O. Box 2000
Charlottetown, PEI C1A 7N8	Charlottetown, PEI C1A 7N8
Email: jmallard@ gov.pe.ca	Email: ikburge @ gov.pe.ca
Phone: (902) 569-7556	Phone: (902) 368-4041

3.0 Service Requirements

3.1 Summary

The successful Proponent will;

- Provide the necessary expertise and guidance in selecting the continuous improvement project from an existing list of project possibilities.
- Provide leadership development to support the creation of a lean culture.
- Support the development of a robust communication plan to enable continued engagement throughout the project life cycle.
- Provide black belt support to lead the project, and mentor existing Lean Six Sigma trained staff and the Project Team.
- Build additional capacity for existing lean six sigma trained staff by mentoring them in the more advanced aspects of lean tools and methodologies applied in a large scale project. i.e. Kaizan events, Visual Management, Error Proofing, Demand Management Value Stream Mapping.
- Provide ongoing evaluation of progress.

The successful Proponent will meet the following project goals:

- Improve client response time.
- Improve staff satisfaction and opportunity for engagement and input.
- Staff time and talent will be better utilized.
- Improving client satisfaction and decreasing client dissatisfaction and complaints.
- Decreasing the areas of risk and bottlenecks (movement of files, duplicative efforts in processing, mistakes or missing information on applications, miscommunication of program criteria and deliverables, etc).

- Program/service that responds efficiently and effectively to the client's needs, when they require it.
- Reducing waste, error proofing and improving flow of work/clients/public.

3.2 Detailed Requirements

The successful Proponent will provide:

- Proof of Black Belt Certification.
- All necessary learning materials, project templates, mentorship structured project databases and updates as is necessary to provide yellow and green belt mentoring.
- Practical application and mentorship.

The successful Proponent must show previous work history in Lean/Six Sigma training and project management with the public sector/government in the areas of program delivery and policy development. Previous work history with government will be considered an asset.

3.3 Service Delivery Requirements

The requirements in this section will prevail as enduring requirements for service delivery throughout the effective period of any Contract(s) resulting from this RFEOI.

1. During the Contract, the proposed resources will be required to work either onsite and/or offsite, as requested.
2. Initial project selection will be done in consultation with the successful Proponent but as at the discretion of the Department. Project updates and summary of project success will be required at both midway and completion of the project. Midway updates may occur via conference call. A final project success summary will be provide on site in Charlottetown within 1 month of the end of a project.
3. Any invoices submitted for services rendered must include a detailed breakdown of the work completed to support the amount that is invoiced.

4.0 Administrative and Legal Requirements

4.1 Prince Edward Island 'Request for Expression of Interest' (PEIRFEOI) Form

As noted on the front page of this RFEOI, the PEIRFEOI Form is the first two pages of the file that is downloaded from our PEI Tender Website. It should be completed, signed and included in the proposal.

4.2 Business Registration

Government requires all Proponents which are companies, partnerships and sole proprietorships outside of PEI operating within the Province of PEI to register with Consumer, Labour and Financial Services, a division of the Department of Environment, Labour and Justice as required under the *Extra-Provincial Corporations Registration Act* R.S P.E.I. 1988, Cap. E-14 and the *Partnership Act* R.S.P.E.I. 1974, Cap. P-2. A sole proprietorship can be operated under the individual's name without the need for registration.

Further details on business registration for extra-provincial corporations, partnerships and sole proprietorships are available at

<http://www.gov.pe.ca/jps/index.php3?number=1027252&lang=E.%20%20>

4.3 Other Important Provisions

4.3.1 Asking Questions

The Proponent is responsible for obtaining any needed clarification of the RFEOI requirements, while the RFEOI is open. Questions should be directed **in writing** to the Government Contact Persons. **Email is the preferred method of contact.** Verbal questions and responses that are not later confirmed in writing with the Government Contact Persons will not be considered an official response.

Questions and responses that are deemed to materially affect the RFEOI requirements, project scope, time lines, etc. or to be of interest to all Proponents **may** be made available at the Province's option. If so, this would be handled as an addendum while the RFEOI is open and made available for download from our PEI Tender Website.

4.3.2 Addenda and Addenda Acknowledgement

Proponents are responsible to ensure that they are aware of and have complied with any addenda issued by visiting the PEI Tender Website.

Responding to this RFEOI **may** require the acknowledgement of a specific addendum or multiple addenda as part of the submission. Acknowledgement requirements, whether optional or mandatory, will be defined in the addendum. The Proponent must monitor for any addenda that may be issued during the full open period of the RFEOI.

4.3.3 Additional Phases of Work

As process improvement capacity increases, the number of projects implemented will subsequently increase requiring additional mentorship.

If additional phases of work are required, the Province reserves the right to amend any Contract that may emerge from this RFEOI to complete these phases of the project. The Province also reserves the right to issue a subsequent tender to address any of these additional phases. The decision whether to amend an existing Contract and/or to issue a subsequent tender is at the sole discretion of the Province.

4.3.4 Conflict of Interest

The Province reserves the right to disqualify any Proponent that in the Province's sole opinion has an actual or potential conflict of interest or an unfair advantage, whether existing now or is likely to arise in the future, or may permit the Proponent to continue and impose such terms and conditions, as the Province in its sole discretion may require.

Proponents are required to disclose, to the Government Contact Persons, any potential or perceived conflict of interest issues prior to RFEOI closing date and time as stated on the PEI Tender Website.

4.3.5 Indemnification, Insurance and Intellectual Property Rights

Confidentiality and Intellectual Property Rights

Any and all information, knowledge or data made available to the Proponent as a result of this agreement shall be treated as confidential information. The Proponent will not directly or indirectly disclose or use it for purposes unrelated to the agreement at any time without first obtaining the written consent of Government, unless the information, knowledge or data is generally available to the public.

The Proponent shall assign and irrevocably agree to assign to Government, without further compensation, all of its right, title and interest, in Canada, the United States and worldwide, in any intellectual property rights, including without limitation all copyright and all moral rights, in any changes made to Government Software in carrying out its obligations hereunder. The Proponent shall ensure that all its employees and any subcontractors are similarly bound to assign their intellectual property rights. Licensing and marketing rights to the developed products will not be granted in this Agreement. Any materials provided by Government to assist the Proponent in carrying out the terms of this Agreement shall be treated as confidential and returned to Government at the conclusion of the Agreement. Any reports or materials prepared for Government in the course of the contract are the property of Government.

Government will own all graphics developed as a result of this Agreement.

The parties agree that all lists, reports, information, statistics, compilations, analyses, and other data generated or collected in any way as a result of this agreement are the exclusive property of Government and shall not be distributed, released, transmitted or used in any way, via any media, outside the purposes of this Agreement, by the Proponent, its employees, agents, servants or others for whom the Proponent is responsible, without the written consent of Government.

The parties agree that Government owns copyright on all aspects of the product or products created as a result of this Agreement (the "Work Product") including all manner of data as set out in this paragraph and including all software developed as a result of this Agreement whether in the form of raw data, analyses, database entries or software or hardware code of any kind or in any form whatsoever, including but not limited to object code and source code and any necessary information with respect to the use of such code such as encryption keys, compiler information and version number.

The Proponent relinquishes all rights to the Work Product created pursuant to this Agreement, including all rights, and including moral rights otherwise accruing to the Proponent pursuant to the Copyright Act, R.S.C. 1985, c. C-42.

Indemnification and Insurance

The Proponent shall indemnify and hold harmless Government and the PEI Public Service Commission, its agents, representatives and employees from and against all claims, demands, losses, costs, damages, actions, suits or proceedings of every nature and kind whatsoever arising out of or resulting from the performance of the work (herein called the "Claim"), provided that any such Claim is caused in whole or in part by any act, error, or omission, including, but not limited to, those of negligence, of the Proponent or anyone directly or indirectly employed by the Proponent or anyone for whom the Proponent may be liable. For further clarification, this indemnity shall not be limited in any way or degree by any insurance the Proponent may have, nor by the limits of any such insurance and it shall endure after termination of this Agreement or any renewal thereof.

The Proponent shall maintain, as a minimum, General Liability Insurance providing not less than Two Million Dollars (\$2,000,000) coverage per occurrence and shall add Government of Prince Edward Island and the PEI Public Service Commission, as additional insured with respect to its liability under this Agreement and provide whatever information Government may require on the insurance that is available. The policy shall include, but not be limited to, bodily and personal injury, property damage, non-owned automobile liability, cross liability and blanket contractual liability.

The Proponent shall maintain, as a minimum, Professional Liability Insurance providing not less than Two Million Dollars (\$2,000,000) on a claims made basis, subject to an annual aggregate limit of Two Million Dollars (\$2,000,000.00), insuring the Proponent's liability resulting from errors and omissions in the performance of professional services under this Agreement. Such insurance shall continue for a term of five (5) years following completion of the work.

The Proponent shall maintain, as a minimum, Automobile Liability Insurance providing not less than One Million Dollars (\$1,000,000) on all vehicles owned, operated or licensed in the name of the Proponent.

All required insurance shall be endorsed to provide Government with 30 days' advance written notice of cancellation or material change.

The foregoing insurance shall be primary and not require the sharing of any loss by any insurer of Government nor any other means of indemnity such as the Prince Edward Island Self Insurance and Risk Management Fund. The policies required by this Agreement shall be in a form and with insurers satisfactory to Government. A certified copy of the policies shall be delivered to Government prior to execution of the agreement. Default of delivery or receipt by Government shall not be construed as acknowledgment or concurrence that there has been compliance with the terms of this Agreement. Furthermore, Government shall have the right, but not the obligation, to review the original(s) of any required insurance policy(ies) in any of its offices. Such review by or on behalf of Government shall not be construed as acknowledgement that there has been compliance with the terms of this Agreement.

4.3.6 Government Responsibilities

Government will assign a project manager to work in conjunction with the Proponent during the project:

Name: Jane Mallard
Title: Director, Policy and Strategy
Telephone #: 902-569-7556
Email address: jmallard@gov.pe.ca

4.3.7 Business Hours

Proposed personnel are expected to work within the normal business hours of the Province, which are:

- Monday to Friday, excluding holidays
- 8:30 a.m. to 5:00 p.m. Atlantic Standard Time (Winter hours), excluding one hour for lunch and 8:00 a.m. to 4:00 p.m. (Summer hours), excluding 30 minutes for lunch. Typically Winter hours start early October and end late May, Summer hours typically start early June and end late September.

During the Contract, the Province will identify any need to work outside the above business hours or in a different location. This may include any needed special arrangements, such as Government Department/Agency escorts and needed security clearances/passes.

4.4 Proposal Format

To help ensure consistency in Proponent responses and ease the evaluation process, the proposal should be prepared and packaged, as outlined in the sections that follow. Please print double-sided whenever possible and limit promotional and/or marketing materials to the information specifically requested in this RFEOI.

4.4.1 Structure of Proposal

The proposal should be comprised of the sections below, presented in the order listed:

- Title page** – This should clearly identify the Proponent's name, postal address, telephone number, and email address as well as the project title and RFEOI #.
- Table of Contents**
- Body of proposal** – This should include the Proponent's technical and pricing responses as set out in section 5 of this RFEOI. The body should be no more than 10 pages, 8½ inch x 11 inch

pages in length including / excluding appendices, 8½ inch x 14 inch, folded pages are permissible for project approach graphics or Gantt charts.

- Appendices** – These should include any response forms included in the RFEOI and any additional information, brochures, etc. that support the proposed services. Entries for each Appendix should appear in the Table of Contents.

4.4.2 Proposal Package

A complete proposal package is comprised of the elements below, presented in the order listed:

- Administrative Elements** – The following items should be placed on **top** of the Proposal, in the order listed:
 - One (1) PEIRFEOI Form** – One original of this PEIRFEOI Form should be **completed, signed and included** in your proposal. The business name provided under ‘NAME OF COMPANY’ on page 1 of this PEIRFEOI Form should be the same name as that reflected on your company’s business registration profile. Ideally, this PEIRFEOI Form should be placed on **top** of your proposal and will be retained by Procurement Services.
 - One (1) Letter of Introduction** – This should identify the Proponent and be signed by a signing officer for the Proponent in order to bind the Proponent to the statements made in the proposal.
 - One (1) Original** – This is the original Proposal document containing the Technical and Pricing responses. The title page should be marked with the text ‘**ORIGINAL**’ at the top. This original Proposal should be left **unbound**.
 - Three (3) Hard Copies** – Proposals without the correct number of copies may be rejected. The title pages for the copies should be prepared in the same way as the title page for the original Proposal, except these should be marked with the text ‘**COPY**’ at the top. Include the completed PEIRFEOI Form in each copy. One of the copies should be left unbound.
 - One (1) Electronic Copy**– Prepare an electronic copy of your Proposal as a Portable Document Format (PDF) file (preferably), or alternately as a Word or WordPerfect file, and include this in your Proposal. The file name should include an abbreviated form of the Proponent’s name and RFEOI #. Electronic copy must be on a virus-free compact disc (CD), virus- free digital versatile disc (DVD) or virus free memory stick. Label the disc or memory stick with the Proponent’s name and RFEOI #.

4.4.3 Proposal Submission

- External packaging** – Ensure the external packaging reflects the information listed below:
 - Proponent’s name
 - Shipping address
 - Telephone number
 - Fax number
 - RFEOI #

4.4.4 Official Record of Submission

The original and all copies of the Proposal should be identical (excluding any obvious differences in labelling, as noted). If discrepancies between the original Proposal and copies of the Proposal are discovered during the evaluation or during the life of any Contract that emerges from this RFEOI, **the original Proposal retained by Procurement Services shall be taken as the correct version** and the Proponent will be advised accordingly.

5.0 Response Requirements

This section describes the **technical** and **pricing** responses to be included in the proposal.

5.1 Technical Response

5.1.1 Executive Summary

Provide a **1-2 page summary** of your technical response, highlighting the key features of your proposal. It should allow the evaluation team to quickly gain an overall perspective of your proposal, prior to reviewing it in detail.

5.1.2 Understanding of RFEOI Requirements

Provide a 1-2 page summary of your understanding of the RFEOI requirements defined in this RFEOI. This content should be expressed in your own words and not simply recite the requirements as defined in this RFEOI.

5.1.3 Proposed Approach/Process and Project Plan

Describe the **approach and/or process** proposed to address the RFEOI requirements. Include any notable methodologies, tools and techniques, and their respective suitability to this project.

Also provide a **project plan** that reflects your proposed approach/process and demonstrates your ability to meet the milestones.

5.1.4 Demonstrated Expertise

Outline experience with comparable projects. Describe any similarities to or differences from this project.

5.1.5 Project References

Provide **three project references** for any work done by you in the past three years that is similar in nature to the requirements defined in this RFEOI. Select references that are similar to Government, and provide a contact name, along with his/her phone number, fax number and email address. The reference information provided should identify the size of the projects conducted for the reference as well as demonstrate the extent of your previous experience, the reference's overall satisfaction with your services and the results achieved, including your adherence to interim and final deadlines.

5.1.6 Proposed Project Manager, Resume and References

The successful Proponent is expected to provide all the necessary project management to complete the services proposed in response to this RFEOI. The Proponent is to include the a project manager who will represent them and deal with any concerns government may the work progresses.

Identify the **project manager** proposed for this project and describe his/her experience.

Include his/her **resume**. This should be structured to emphasize his/her relevant qualifications and project management experience in successfully managing projects of a similar size and scope to that required by this RFEOI.

The resume should include **at least three project references**, including:

- Name of organization
- Name, title, telephone number and email of a contact for the organization
- Brief description of the scope, complexity, dates and duration of the project

5.1.7 Proposed Resources, Resumes and References

The Proponent should be able to demonstrate that its **proposed team as a whole** meets or exceeds the RFEOI requirements. Prepare the table below to identify **all** personnel who will be assigned to the project and contribute to (i) the **routine management** and/or (ii) the **performance** of the required services. As shown, provide each person's name, title, role on this project, experience in this role and his/her respective employment status.

Name	Title	Project Role	Role Experience (# months)	Employment Status (E = employee, C = contractor, P = partner)

The Province encourages innovation and competition in the Proponent community through arrangements such as partnerships and consortiums. If sub-contractors or partners of a Proponent are to be used for this project, they must be identified in your table. If so, describe the general range of services that the respective contractors (companies or individuals) provided and how this benefits your company. If no contractors or partners are identified, this will be interpreted to mean that only a Proponent's 'own resources' will be used.

Submit the individual **resumes** for each proposed resource. The resumes should be structured to emphasize their relevant qualifications and experience in successfully completed projects of a similar size and scope to that required by this RFEOI.

Each resume should include **at least two project references** where the proposed individual served in a similar role, including:

- Name of organization
- Name, title, telephone number and email of a contact for the organization
- Brief description of the scope, complexity, dates and duration of the project
- Role the proposed individual played in the referenced project

5.1.8 Resource Management

By virtue of responding to this RFEOI, the Proponent is committing to make the proposed resources available to this project when needed and, once the project begins, it agrees to take any steps necessary to ensure the ongoing availability of its proposed resources during this project.

The Province acknowledges that instances can arise where a proposed resource is no longer employed by or associated with the Proponent, or is otherwise unavailable to the Proponent at the time of the service requirement. In these cases, the Proponent agrees to provide **replacement resources with equivalent (or greater) experience and capability**, and the selection of the replacement resources will be subject to the approval of Government.

In the proposal, describe the process that would be used for including Government in the selection of replacement resources and for securing Government's approval. Describe how changes in the project manager in particular would be handled, if this becomes necessary.

If new service requirements emerge during the project, Government will make every effort to provide the successful Proponent with as much advance notice as possible. Describe the process and typical timelines involved in making **additional resources** available to this project.

Describe the process that would be used to resolve a situation where Government concludes that an assigned resource from the Proponent is **not performing** their responsibilities adequately.

5.1.9 Added Value

'Added value' is the realization of additional benefits beyond the inherent worth of a good or service. Some examples for services include approach, expertise, references, resources, management, tools and/or methodologies, etc., or a combination of these.

Describe the aspect(s) of your proposal believed to result in notable added value for this project and/or Government as a whole.

5.2 Pricing Response

5.2.1 Estimated Cost – Time and Materials

Prepare the following table for inclusion in your proposal:

Cost Element	Number of Days	Cost per diem (CDN)
Consultation with Management for Project		\$
Project Management and mentorship		\$
Travel Expenses		\$
Other (specify)		\$
Total		\$

Provide appropriate details to support your figures, including estimates of the work effort and a breakout of expected expenses.



REQUEST FOR EXPRESSION OF INTEREST

Tender Number: 4219

Closing Date: Dec 18, 2015

Closing Time: 2:00PM

1. Check for changes to this request

Before submitting this proposal, visit the Procurement website www.gov.pe.ca/tenders to see if any Addenda detailing changes have been issued on this tender. Changes may be posted up until the tender closing time. It is your responsibility to acknowledge and take into account **ALL** Addenda.

2. Give your business information (please print)

Name of Company: _____
(if you are not a registered company, give your name)

Street Address: _____

City: _____ Province: _____

Postal Code: _____ Email Address: _____

Mailing Address (if different): _____

Phone Number: _____ Fax Number: _____

HST/GST Registration Number (BN): _____ (leave blank if NOT applicable)

3. Follow any special instructions

The full RFQ document is attached to this PDF.

4. Review the following documents, which will form part of your proposal

(All documents can be found on the Procurement Services website at <http://www.gov.pe.ca/tenders>)

- Atlantic Standard Terms and Conditions
- Applicable Trade Agreements

5. Fill in your unit price, extended price and total price for all items

Quote prices in Canadian dollars, before taxes

6. Give your delivery and payment terms

Delivery Required by:		Goods will be delivered by:	
Delivery Location:			
FOB:	Destination <input type="checkbox"/>	Other <input type="checkbox"/>	(Please Specify) _____
Payment Terms:	Net 30 <input type="checkbox"/>	Other <input type="checkbox"/>	(Please Specify) _____

7. Acknowledge receipt of addenda (if any)

ADDENDUM	SIGNATURE
Addendum #1	
Addendum #2	
Addendum #3	

Were there more than 3 addenda for this proposal? YES NO

Indicate the number of additional Addendums you have received.

Please sign indicating that you acknowledge the additional addenda noted above

8. Sign your Proposal

I confirm that the information I provided on this proposal is complete and accurate and that I am authorized to sign on behalf of the company.

Name (please print): _____ Position or Title: _____

Signature: _____ Date: _____

9. Submit Proposal To:

PROCUREMENT SERVICES
 95 Rochford Street
 2nd Floor South, Shaw Building, Room 27
 PO Box 2000, Charlottetown, PE, C1A 7N8
 Telephone: (902)368-4040
 Fax # 902-368-5171
