

Page 1 redacted for the following reason:

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S17

## Kindylides, Thespina LCTZ:EX

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**From:** Martin, Leigh LCTZ:EX  
**Sent:** Wednesday, September 26, 2012 3:21 PM  
**To:** Martin, Leigh LCTZ:EX  
**Subject:** RE: DLP Evaluation Workbook

-----Original Appointment-----

**From:** Martin, Leigh LCTZ:EX  
**Sent:** Thursday, May 24, 2012 11:30 AM  
**To:** Chambers, Jay LDB:EX; Bissoondatt, Roger LDB:EX; Wilson, Kelly LDB:EX; McDonnell, Ken LDB:EX; Poutney, Richard G LCTZ:EX; Kishimoto, Mike J LCTZ:EX; Agerup, Pelle LCTZ:EX; Macauley, George JAG:EX  
**Subject:** DLP Evaluation Workbook  
**When:** Tuesday, June 5, 2012 9:30 AM-12:00 PM (GMT-08:00) Pacific Time (US & Canada).  
**Where:** S 15

Hi Everyone,

This meeting is to go over the evaluation workbook that will be used during the July 9 - 13 evaluation meetings.

Prior to this meeting we will send out a draft copy of the workbook.

Thanks,  
Leigh

## Kindylides, Thespina LCTZ:EX

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**From:** Martin, Leigh LCTZ:EX  
**Sent:** Wednesday, September 26, 2012 3:28 PM  
**To:** Martin, Leigh LCTZ:EX  
**Subject:** RE: DLP Evaluation Workbook - Meeting 2

-----Original Appointment-----

**From:** Martin, Leigh LCTZ:EX  
**Sent:** Thursday, May 24, 2012 3:28 PM  
**To:** Poutney, Richard G LCTZ:EX; Wilson, Kelly LDB:EX; McDonnell, Ken LDB:EX; Chambers, Jay LDB:EX; Bissoondatt, Roger LDB:EX; Hughes, Bette-Jo LCTZ:EX; Kishimoto, Mike J LCTZ:EX; Agerup, Pelle LCTZ:EX; Macauley, George JAG:EX; 'Frank Catala'; Brenner, Dawson LCTZ:EX  
**Subject:** DLP Evaluation Workbook - Meeting 2  
**When:** Monday, June 25, 2012 1:30 PM-4:00 PM (GMT-08:00) Pacific Time (US & Canada).  
**Where:** S 15

Hi Everyone,

We had to adjust the date to work with a few schedules.

(Ken, I know S 22 so we will chat with you prior to the meeting).

This meeting is to work on the final copy of the evaluation workbook for the July 9 - 13th evaluation meetings.

Thanks,  
Leigh

# **Distribution of Liquor Project NRFP Process**

## **Evaluators Meeting #2**

**June 25, 2012**



# Proponents

- **Centric Retail Logistics Inc. (Metro Supply Chain Group)**
- **ContainerWorld Forwarding Services Inc.**
- **Dimex Distribution Corp.**
- **Exel Canada Ltd.**
- **Hillebrand Westlink Inc.**
- **Kuehne+Nagel Ltd.**
- **Schenker of Canada (DB Logistics)**

# Handbook

- **Scores**
- **Financial model - Frank**
- **Approve process**

# Conduct

- **Keep Proposals and handbook secure**
- **Encrypted memory sticks / computer**
- **Murphy's law... 250-516-5340**



# Scheduling

- Any commitments to work around?
- Approximately one proposal per day
- Many Proposals = evening work
- Stage 3 – Oct 9-12



# **Distribution of Liquor Project NRFP Process**

## **Evaluators Meeting**

**June 5, 2012**

# Introductions

- **Jay Chambers – General Manager, LDB**
- **Roger Bissoondatt – Chief Financial Officer, LDB**
- **Kelly Wilson – Executive Director, Retail services, LDB**
- **Ken McDonnell – Director, Warehouse Operations, LDB**
- **Bette-Jo Hughes – Assistant Deputy Minister, Service BC, LCTZ**
- **Richard Poutney – Executive Lead, SPO, LCTZ**
- **George Macauley – Fairness Monitor, Contractor**
- **Leigh Martin – Project Director, SPO, LCTZ**
- **Mike Kishimoto – Director, SPO, LCTZ**
- **Pelle Agerup – Senior Director, Strategic Acquisitions, LCTZ**

# Agenda

- Roles
- Code of conduct
- Government reference check
- Feedback session
- Customer reference check
- Stage 3 evaluation
- Closing day logistics
- Evaluation handbook

## **Roles during evaluation**

- **Jay Chambers – General Manager, LDB**
- **Roger Bissoondatt – Chief Financial Officer, LDB**
- **Kelly Wilson – Executive Director, Retail services, LDB**
- **Ken McDonnell – Director, Warehouse Operations, LDB**
- **Bette-Jo Hughes – Assistant Deputy Minister, Service BC, LCTZ**
- **Richard Poutney – Executive Lead, SPO, LCTZ**
  
- **George Macauley – Fairness Monitor, Contractor**
- **Leigh Martin – Project Director, SPO, LCTZ**
- **Mike Kishimoto – Director, SPO, LCTZ**
- **Pelle Agerup – Senior Director, Strategic Acquisitions, LCTZ**
  
- **SMEs e.g. Frank Catala**



# Code of conduct

- **Declare any conflict of interest**
  - Real or perceived
- **No communications with Proponents regarding the NRFP**

# Timeline

Activity	Dates
Evaluation process review and handbook review	June 5
Closing date	June 29
Government reference check (Stage 1)	June 29 - until completed
Rectification process (if needed)	June 29 - until completed
Evaluators individual reading and preliminary evaluation	July 3 - July 8
Consensus Evaluations	July 9 - July 13



# Government reference check

- Conducted in parallel with evaluators reading proposals
- Any contract with Gov't over \$1M over the last 3 years – pass/fail
- Cross reference with CAS after closing
- Qualifications Review Committee

# Rectification process

- If needed we can ask Proponents to correct errors:
  - Signatures missing
  - Filled in financial model wrong
  - Missing information
  - Etc.
- By project team in parallel with reading

# Customer reference check

- Before announcing the up to top three
- Broad terms in NRFP
- Establish benchmark and threshold

# Feedback session

- **Last week of July**
- **Half day sessions with each of the shortlisted proponents**
- **Debrief of evaluation – room for improvement**
- **Starts the proposal refinement process**



# Closing day logistics

- **Electronic and/or paper**
- **Who is available after 4PM on June 29**
- **Where?**

# Handbook

- **General Rules and Conduct**
- **Preparations and Evaluation**
  - Preparation
  - Evaluations scoring table
  - Reaching Consensus
  - Feedback considerations
  - Fairness monitor



# Handbook

- **Response guidelines (from NRFP)**
- **Room for evaluators notes**
  - **Strengths**
  - **Weaknesses**
  - **Feedback considerations**
  - **Preliminary score**

# To do today

- **Sub scores**
- **Response guidelines**