

SME Supply Chain DC Fac Ops Log & PM DC Relocation – RFP2013-06-18
 Date of Issue: May 17, 2013

24

COMPANY	DATE RECEIVED
Metro Logistics	July 5
CTR Management Consultants	July 5
Trybec Management Services	July 5
KPMG	July 5
CGI	July 5
IBM	July 5
KOM International	July 5
Kurt Salmon	July 5
Protivity	July 5
Stantec	July 5
Sierra Systems	July 5
Deloitte	July 5
Devenore Company	July 5
PwC	July 5
BizTech Masters	July 5
Tompkins International	July 5
Lidd	July 5
Sedlak	July 5

WITNESSED BY:

[Signature]
 Signature

[Signature]
 Signature

[Signature]
 Signature

DATE:

July 8, 2013

July 8 2013

July 8/2013



AGENDA

VENDOR PRESENTATION / INTERVIEW

for

RFP2013-06-21 for SME in Supply Chain & Logistics Management

Location: BC Liquor Distribution Branch Office - 2625 Rupert Street, Vancouver, B.C. V5M 3T5

Date: Thursday, August 29th, 2013

Time: 01:30 pm to 03:00 pm

LDB Representatives (may include, but not limited to): Blain Lawson, Kelly Wilson, Ken McDonnell, Bill Michael, Rob James, Constantin Starck, Gary Branham, Scott Lovas, Sandra Smith

Time:	Topic:	Responsibility:
01:30 pm <i>(5 mins)</i>	Introductions	LDB
01:35 pm <i>(70 mins)</i>	Proponent's Presentation & Proponent's Response to Questions	Proponent
02:45 pm <i>(15 mins)</i>	Responding to Additional Questions from the LDB	Proponent & LDB
03:00 pm	Closing of meeting	LDB



AGENDA

VENDOR PRESENTATION / INTERVIEW

for

RFP2013-06-21 for SME in Supply Chain & Logistics Management

Location: BC Liquor Distribution Branch Office - 2625 Rupert Street, Vancouver, B.C. V5M 3T5

Date: Thursday, August 29th, 2013

Time: 08:30 am to 10:00 am

LDB Representatives (may include, but not limited to): Blain Lawson, Kelly Wilson, Ken McDonnell, Bill Michael, Rob James, Constantin Starck, Gary Branham, Scott Lovas, Sandra Smith

Time:	Topic:	Responsibility:
08:30 am <i>(5 mins)</i>	Introductions	LDB
08:35 am <i>(70 mins)</i>	Proponent's Presentation & Proponent's Response to Questions	Proponent
09:45 am <i>(15 mins)</i>	Responding to Additional Questions from the LDB	Proponent & LDB
10:00 am	Closing of meeting	LDB



AGENDA

VENDOR PRESENTATION / INTERVIEW

for

RFP2013-06-21 for SME in Supply Chain & Logistics Management

Location: BC Liquor Distribution Branch Office - 2625 Rupert Street, Vancouver, B.C. V5M 3T5

Date: Thursday, August 29th, 2013

Time: 11:00 am to 12:30 pm

LDB Representatives (may include, but not limited to): Blain Lawson, Kelly Wilson, Ken McDonnell, Bill Michael, Rob James, Constantin Starck, Gary Branham, Scott Lovas, Sandra Smith

Time:	Topic:	Responsibility:
11:00 am <i>(5 mins)</i>	Introductions	LDB
11:05 am <i>(70 mins)</i>	Proponent's Presentation & Proponent's Response to Questions	Proponent
12:15 pm <i>(15 mins)</i>	Responding to Additional Questions from the LDB	Proponent & LDB
12:30 pm	Closing of meeting	LDB



QUESTIONS

VENDOR PRESENTATION / INTERVIEW

RFP2013-06-21 for SME in Supply Chain & Logistics Management

General:

1. Please share with us a similar supply chain project that you have undertaken within the most recent 5 years: describe the project and how you approached the task, the scope, the challenges you encountered and had to overcome, the timeline and the end results.
2. From what you know about the Liquor Distribution Branch business today, what do you think will be the LDBs biggest challenge and how would you recommend that piece be approached.
3. Knowing something of the liquor model in BC today, do you see an opportunity for the LDB to expand its' distribution services and if so, what could that opportunity look like to you.
4. The liquor model in British Columbia is a political environment. In order to be most successful, many changes are likely to be presented to the LDB. Do you have experience dealing in an environment such as this and what is your best suggestion for approach.
5. What is the most challenging supply chain project your firm has undertaken?
6. What is your approach to change management for this project? How will you ensure the BCLDB successfully transitions to the future/ new operating model?
7. Tell us about your experience with change management and what you propose for the BCLDB and how you would implement.
8. Please articulate your understanding of the scope, what you're expected to do, describe the process for each stage, and the LDB resources required.
9. What is your methodology for this project including tasks, activities and deliverables including a Gantt chart for the first part of the engagement?
10. Metro is an accomplished operator, and not a consulting company. Please provide us with some examples of where they have successfully acted in the consulting role.
11. What steps will you take to ensure you'll act in a consulting role and not in an operator/ takeover role?

Green:

12. Could you provide examples to support your responses in the Environmental-Related Questionnaire (Schedule C)?
13. Can you describe in more detail the services that you can provide to the LDB to help them improve the environmental performance of their supply chain and logistics management?



QUESTIONS

VENDOR PRESENTATION / INTERVIEW

RFP2013-06-21 for SME in Supply Chain & Logistics Management

General:

1. Please share with us a similar supply chain project that you have undertaken within the most recent 5 years: describe the project and how you approached the task, the scope, the challenges you encountered and had to overcome, the timeline and the end results.
2. From what you know about the Liquor Distribution Branch business today, what do you think will be the LDBs biggest challenge and how would you recommend that piece be approached.
3. Knowing something of the liquor model in BC today, do you see an opportunity for the LDB to expand its' distribution services and if so, what could that opportunity look like to you?
4. The liquor model in British Columbia is a political environment. In order to be most successful, many changes are likely to be presented to the LDB. Do you have experience dealing in an environment such as this and what is your best suggestion for approach?
5. What is the most challenging supply chain project your firm has undertaken?
6. What is your approach to change management for this project? How will you ensure the BCLDB successfully transitions to the future/ new operating model?
7. Tell us about your experience with change management and what you propose for the BCLDB and how you would implement.
8. Please articulate your understanding of the scope, what you're expected to do, describe the process for each stage, and the LDB resources required.
9. Please provide resumes of the key team players with whom we will be working with.

Green:

10. What services did you provide to help Patagonia and others achieve LEED certification at their facilities?
11. Who is the partner that advises on lighting efficiency and rebates? Is it a subcontractor or the local utility (BC Hydro)?



QUESTIONS

VENDOR PRESENTATION / INTERVIEW

RFP2013-06-21 for SME in Supply Chain & Logistics Management

General:

1. Please share with us a similar supply chain project that you have undertaken within the most recent 5 years: describe the project and how you approached the task, the scope, the challenges you encountered and had to overcome, the timeline and the end results.
2. From what you know about the Liquor Distribution Branch business today, what do you think will be the LDBs biggest challenge and how would you recommend that piece be approached.
3. Knowing something of the liquor model in BC today, do you see an opportunity for the LDB to expand its' distribution services and if so, what could that opportunity look like to you?
4. The liquor model in British Columbia is a political environment. In order to be most successful, many changes are likely to be presented to the LDB. Do you have experience dealing in an environment such as this and what is your best suggestion for approach?
5. What is the most challenging supply chain project your firm has undertaken?
6. What is your approach to change management for this project? How will you ensure the BCLDB successfully transitions to the future/ new operating model?
7. Tell us about your experience with change management and what you propose for the BCLDB and how you would implement.
8. Please articulate your understanding of the scope, what you're expected to do, describe the process for each stage, and the LDB resources required.

Sustainability:

9. Could you provide examples to support your responses in the Environmental-Related Questionnaire (Schedule C)?
10. Can you describe the services that you can provide to the LDB to help them improve the environmental performance of their supply chain and logistics management?

RECOMMENDED VENDOR

CONTRACT DESCRIPTION

MAXIMUM CONTRACT \$ VALUE

CONTRACT TERM

**CONTRACT ADMINISTRATOR &
DEPARTMENT**

RECOMMENDATION SUBMITTED BY

RECOMMENDATION

2. RATIONALE FOR SELECTION

CRITERIA	WEIGHTING	MINIMUM SCORE

Min Score	Weighting %	Evaluation Criteria	Sedlak						Metro Supply Chain Group						Tompkins International											
			KW	EM	CS	DM	KM	RJ	SL	KW	EM	CS	DM	KM	RJ	SL	KW	EM	CS	DM	KM	RJ	SL			
70	20	Corporate: Demonstrated ability and track record of the Proponent (individual, company or partnership), financial & technical capability, relevant experience of team/resource(s)	20.00						18.00						16.00											
1	3.5																									
70	20	Resource(s): Recent & related experience, skills and qualifications	20.00						20.00						16.00											
2	3.5																									
60	35	Proposed approach, methodology and schedule; Completeness and quality of responses in addressing the requirements and deliverables, and overall suitability of the proposals in meeting the requirements of the BCLDB	35.00						28.00						24.50											
3	3.0																									
4	15	Pricing / Fee Structure / Per diem rate							s.21																	
5	5	Green Initiatives & Environmental Questionnaire	3.00						2.00						1.00											
6	5	Value Added	5.00						5.00						2.00											
									s.21																	
			1						2						3											
The three (3) highest scoring Proponents were each invited to participate in a presentation / interview																										
6	25	Presentation / Interview	24.000						16.000						14.000											
									s.21																	

3. BUDGET

4. SPONDENTS

5. EVALUATORS / REVIEWERS / APPROVERS



EVALUATOR (Contract Administrator): KEN McDONNELL – Director, Distribution

SEPT 19/13

Date



EVALUATOR: BILL MICHAELS – Director, Purchasing

SEPT 11/13

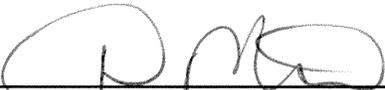
Date



EVALUATOR: CONSTANTIN STARCK – Director, Finance Projects & Systems

2013-09-17

Date



EVALUATOR: DONNA MOHN – Director, Wholesale Business

Sept 11/13

Date

for Janet Robertson

EVALUATOR: ROB JAMES – Director, IT Architecture & Planning

Sept 11/13

Date



EVALUATOR: SCOTT LOVAS – Non-Liquor Purchasing

Sept. 11, 2013

Date



EVALUATOR/ APPROVAL: KELLY WILSON – Executive Director, Retail Services

Sept. 11/13

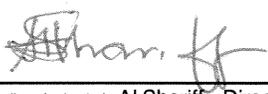
Date



REVIEWER: Sandra Smith – Manager, Non-Liquor Purchasing

Sept 11, 2013

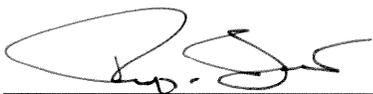
Date



APPROVAL (Spending Authority): Al Shariff - Director, Finance Admin

Sep. 11/13

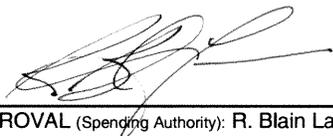
Date



APPROVAL (Spending Authority): Roger Bissoondatt - Chief Financial Officer

Sept 12/13

Date



APPROVAL (Spending Authority): R. Blain Lawson, General Manager, CEO

Sept 12/13

Date

Tender Issue Date:		Friday, May 24, 2013												
Tender Closing Date:		Friday, July 05, 2013												
	SUBMISSIONS RECEIVED	Email	First Name	Last Name	Title	Mobile	Phone	Fax	Mailing Address	Address 2	City	Province	Postal Code	Country <i>(if other than Canada)</i>
1	Deloitte													
2	Sierra Systems													
3	KOM International Inc													
4	IBM													
5	BizTechMasters													
6	Trybec Management Services, Inc													
7	KPMG													
8	Protiviti													
9	Kurt Salmon													
10	CGR													
11	PWC													
12	Stantec Consulting Ltd													
13	CGI Systems & Management Consultants Inc													
14	Tompkins International													
15	Metro Supply Chain Group													
16	LIDD Supply Chain Intelligence													
17	Sedlak													
18	Newmark Knight Frank Devencore													

Instructions for NLP Representative

BEFORE OPENING TENDERS / RFPS

The assigned Buyer confirms the criteria advertised in the TENDER / RFP are aligned to the criteria in the Evaluation Worksheet. Buyer should amend evaluation worksheet if necessary.

Determine which BCLDB stakeholders need to be members of the Evaluation Team (the "Team") / other internal or external advisors do not need to be on the Team

Determine appropriate weighting using your best estimate and circulate to Team for comments and input before finalizing. **DOUBLE CHECK THE WEIGHTING FORMULAS ARE CORRECT.**

Save final version of the Evaluation Worksheet on the O-drive in the appropriate file under Successful. Note no changes can be made once submissions have been opened (refer to procedures for Receiving and Handling Tenders / Proposals)

SEND MATERIAL TO EVALUATION TEAM MEMBERS

- 1 Complete the Evaluator Guidelines and prepare Evaluation Worksheet and Respondents' Strengths & Weaknesses
- 2 Attach hard copy of the Evaluator Guidelines to hard copy of the tender or proposal and send to each evaluator
- 3 Send electronic copy of the Evaluator Guidelines, Evaluation Worksheet and Respondents' Strengths & Weaknesses table to each evaluator

RFP2013-06-21 SME in Supply Chain & Logistics Management			
NLP Representative		Name	Initials
Rep:		Sandra Smith	SS
Tender Information			
NDA received, if required:			
Issue Date:		24/05/2013	
Site Visit:			
Original Closing Date:		21/06/2013	
Extended, if any:		05/07/2013	
Q& A	Date Issued	Description	
1)	14/06/2013	Addendum # 2 -Questions & Answers	
2)			
3)			
Addendum	Date Issued	Description	
1)	13/06/2013	Addendum # 1 - Closing Date extended to July 05, 20	
2)			
3)			
Evaluation Team Members		Name	Initials
Evaluator_ 1		Kelly Wilson	KW
Evaluator_ 2		Bill Michaels	BM
Evaluator_ 3		Constantin Starck	CS
Evaluator_ 4		Donna Mohn	DM
Evaluator_ 5		Ken MacDonnell	KM
Evaluator_ 6		Rob James	RJ
Evaluator_ 7		Scott Lovas	SL
Number of evaluators		7	
Number of Tender Responses:		18	
Scheduling			
Packages distributed:			
Scores due to NLP (Date)			
Evaluation Team Meeting (Date)			
Clarification Meetings (Date/s)			
Supplier Meetings (Date/s)			
Negotiation Meetings (Date/s)			
Administrative Information			
Files Updated			
	Internal Email		
	Correspondence		
	Receipt Confirmation		
	O-drive Updated		
	Oracle		
	Insurance provided		
	WorkSafeBC entered		

Evaluator Guidelines Template

# - Name of Tender / Proposal:	RFP2013-06-21 SME in Supply Chain & Logistics Management		
NLP Representative:	Sandra Smith		
Due Date to return Individual Scoring to NLP Rep:		Number of Evaluators:	7
EVALUATION TEAM MEMBERS			
#	Name	Initials	
1	Kelly Wilson	KW	
2	Bill Michaels	BM	
3	Constantin Starck	CS	
4	Donna Mohn	DM	
5	Ken McDonnell	KM	
6	Rob James	RJ	
7	Scott Lovas	SL	

Thank you for participating as a member of the Evaluation Team (the "Team"). Please read these guidelines carefully before proceeding to ensure a fair evaluation process for submitted Tenders / RFPs.

IMPORTANT REMINDER
NLP is the only permitted point of contact with any potential vendor during the evaluation process and contacting a Bidder may put them at risk of being disqualified.
BEFORE YOU BEGIN

Ensure no conflict of interest, or perceived conflict of interest, prevents you from being a member of this Team (Notify the NLP Representative to confirm no conflict, if necessary).

Read and understand the advertised Tender / RFP document.

Review the evaluation criteria to ensure they are consistent with the Tender / RFP and confirm to the NLP Representative that you agree the weighting is appropriate to fairly assess the submissions.

Ensure you have the FINAL copy of the Evaluation Worksheet and one copy of each submission.

Ensure you allot sufficient time for each evaluation in order to meet the Team's planned review date.

- ON YOUR OWN**
- 1 Review and score each submission, using the Evaluation Worksheet (refer to scoring guide at bottom of Worksheet).
 - 2 Add your comments on the Strengths & Weaknesses tab to be used for follow-up questions with short-listed Bidders, and for debriefings for unsuccessful Bidders.
 - 3 Send a copy of the completed Evaluation Worksheet and Strengths & Weaknesses to the NLP Representative by the Due Date (see above). The consolidated results will be provided to you.

- WITH THE TEAM**
- 4 Discuss the consolidated Evaluation Worksheet and Strengths & Weaknesses of each Bidder.
 - 5 Identify *clarification* questions for one or more Bidders (note no *new* information can be requested).
 - 6 Confirm, through the NLP Representative, any extra information about a Bidder not obtained from the submission. (It is important to not rely on heresay.)
 - 7 Make a final recommendation or determine other course of action.
 - 8 If required, determine members for the Negotiation Team; these may differ from the Evaluation Team.
 - 9 Return any hard copies or soft copies of Evaluation Worksheets and notes to the NLP Representative as these must be kept (in a secure location by NLP) for confidentiality reasons.

Name of Tender	RFP2013-06-21 SME in Supply Chain & Logistics Management
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CRITERIA DESCRIPTION		Weighting	Minimum Score
1	Corporate: Demonstrated ability and track record of the Proponent (individual, company or partnership), financial & technical capability, relevant experience of team/resource(s)	20	70
2	Resource(s): Recent & related experience, skills and qualifications	20	70
3	Proposed approach, methodology and schedule; Completeness and quality of responses in addressing the requirements and deliverables, and overall suitability of the proposals in meeting the requirements of the BCLDB	35	60
4	Pricing / Fee Structure / Per diem rate	15	
5	Green Initiatives & Environmental Questionnaire	5	
6	Value Added	5	
		100	

Evaluation Team Sign-off:

Kelly Wilson Date:

Bill Michaels

Constantin Starck Date:

Donna Mohn

Evaluation Worksheet

# - Name RFP / Tender:		RFP2013-06-21 SME in Supply Chain & Logistics Management								Name of Evaluator:		KW	
Company Name/Submission #		Deloitte								Total # of Respondents:		18	
Evaluation Criteria	Weighting %	Minimum Score	Please Select <u>One</u>					WEAKNESSES	STRENGTHS				
			Score (0-5)										
1	Corporate: Demonstrated ability and track record of the Proponent (individual, company or partnership), financial & technical capability, relevant experience of team/resource(s)	20	75	0	1	2	3	4	5				
2	Resource(s): Recent & related experience, skills and qualifications	20	80	0	1	2	3	4	5				
3	Proposed approach, methodology and schedule; Completeness and quality of responses in addressing the requirements and deliverables, and overall suitability of the proposals in	20	80	0	1	2	3	4	5				
4	Pricing / Fee Structure / Per diem rate	20	80	0	1	2	3	4	5				
5	Green Initiatives & Environmental Questionnaire	15	0	0	1	2	3	4	5				
SCORING GUIDE													

Whole number scores only - no half marks and every criteria for each vendor needs to be scored.

0	Unsatisfactory	Completely unsatisfactory response - respondent failed to meet the evaluation criterion and/or provided no response at all.
1	Poor	The proponent barely satisfies the evaluation criterion. Significant risk may exist by proceeding with this proponent and would require major effort to develop a satisfactory performance level.
2	Marginally acceptable	The respondent is able to satisfy the evaluation criterion but further evidence and information is required to test and substantiate performance level claims.
3	Acceptable	The respondent has demonstrated the evaluation criterion has been clearly satisfied, and understanding of the requirements is substantiated by detailed information. Actual experience may be limited in some areas.
4	Very good	The respondent has demonstrated the evaluation criterion has been clearly satisfied, substantiated by experience in providing significant level of beneficial insight and knowledge in supplying the services and meeting the needs.
5	Excellent	The respondent has clearly demonstrated that they satisfy or exceed the evaluation criterion by offering a superior solution/service, substantiated by experience, knowledge, and excellent references.

Min Score	Weighting %	Evaluation Criteria	Deloitte	Sierra Systems	KOM International Inc	IBM	BizTechMasters	Trybec Management Services Inc	KPMG	Protiviti	Kurt Salmon	CGR	PWC	Stantec Consulting Ltd	CGI Systems & Management Consultants Inc	Tompkins International	Metro Supply Chain Group	LIDD Supply Chain Intelligence	Sedlak	Newmark Knight Frank Devencore
70	20	Corporate: Demonstrated ability and track record of the Proponent (individual, company or partnership), financial & technical capability, relevant experience of team/resource(s)	3.500	2.000	3.000	3.500	1.600	2.500	3.625	4.000	3.875	2.600	4.000	2.000	3.000	4.000	4.500	2.375	5.000	2.800
3.5	1.												16.0			16.0	18.0		20.0	
70	20	Resource(s): Recent & related experience, skills and qualifications	3.250	2.000	2.250	3.200	1.600	2.800	3.375	2.500	3.750	2.400	4.000	2.000	3.000	4.000	5.000	3.000	5.000	3.000
3.5	2.												16.0			16.0	20.0		20.0	
60	35	Proposed approach, methodology and schedule; Completeness and quality of responses in addressing the requirements and deliverables, and overall suitability of the proposals in meeting the requirements of the BCLDB	3.750	2.000	2.250	3.250	1.333	2.625	3.000	3.333	2.600	3.250	4.000	3.000	3.500	3.500	4.000	4.000	5.000	3.250
3.0	3.												28.0			24.5	28.0		35.0	
	15	Pricing / Fee Structure / Per diem rate											s.21			s.21			s.21	
	4.																			
	5	Green Initiatives & Environmental Questionnaire											2.000			1.000	2.000		3.000	
	5.																			
	5	Value Added	3.000	2.667	2.000	2.667	0.500	2.000	3.500	1.000	3.000	3.000	4.000	4.000	2.500	2.000	5.000	3.500	5.000	6.000
	6.																			
		Did not meet minimum score requirement(s) on Evaluation Criteria #:	2	1, 2 & 3	1, 2 & 3	2	1, 2 & 3	1, 2 & 3	2	2	3	1 & 2		1 & 2	1 & 2			1 & 2	s.21	1 & 2
		GREEN COLOUR CODING: The minimum score requirement(s) were met on Evaluation Criteria											s.21			s.21			s.21	
	25 Points	Presentation / Interview														14.000	16.000		24.000	
		Total:																		s.21

PROPONENT NAME:		PRICING:	EXPENSES/ DISBURSEMENTS:	PRICING:	RATING:	Standing:		\$ w/o Exp:	RATING:	Standing:	TIMELINE:
Metro		\$	\$	\$		3		\$		2	1 year (52 weeks)
PWC	Option 1	\$ s.20	\$ s.21	\$ s.21		2		\$ s.21		4	10 weeks
PWC	Option 2	\$	\$	\$	s.21	5		\$		5	10 - 12 weeks
Sedlak		\$ 288,187.00	\$ 65,250.00	\$ 353,437.00		4		\$ 288,187.00	s.21	3	16 weeks
Tompkins		\$ s.21	\$ s.21	\$ s.21		1		\$ s.21		1	8 weeks

\$ denotes the highest disbursement value from all shortlisted proponents and added to pricing for overall price (no disbursement \$s provided)

\$ denotes conversion from \$277,450 USD to CDN \$ using 1.0387 the Bank of Canada exchange rate on June 20, 2013

\$ pricing does not include any BCLDB Data Collection.

Min Score	Weighting %	Evaluation Criteria	Sedlak							Metro Supply Chain Group							Tompkins International							PWC						
			KW	BM	CS	DM	KM	RJ	SL	KW	BM	CS	DM	KM	RJ	SL	KW	BM	CS	DM	KM	RJ	SL	KW	BM	CS	DM	KM	RJ	SL
70	20	Corporate: Demonstrated ability and track record of the Proponent (individual, company or partnership), financial & technical capability, relevant experience of team/resource(s)	20.00							18.00							16.00							16.00						
1	35																													
70	20	Resource(s): Recent & related experience, skills and qualifications	20.00							20.00							16.00							16.00						
2	35																													
60	35	Proposed approach, methodology and schedule; Completeness and quality of responses in addressing the requirements and deliverables, and overall suitability of the proposals in meeting the requirements of the BCLDB	35.00							28.00							24.50							28.00						
3	30																													
4	15	Pricing / Fee Structure / Per diem rate	s.21																											
5	5	Green Initiatives & Environmental Questionnaire	3.00							2.00							1.00							2.00						
6	5	Value Added	5.00							5.00							2.00							4.00						
			s.21																											
			4																											
The three (3) highest scoring Proponents were each invited to participate in a presentation / interview																														
25		Presentation / Interview	24.000							16.000							14.000													
			s.21																											