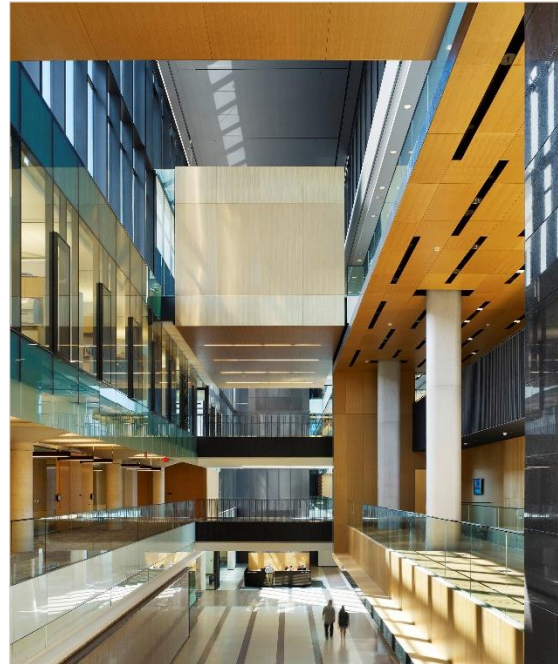


Ontario Science Centre Relocation Project

Request for Proposals for Planning Design and Conformance Consulting Services

RFP No. 23-066

Respondents' Meeting- July 6, 2023



Agenda

1. Welcome and Introductions
2. Project Schedule
3. Project Overview
4. IO and MOI Roles
5. DBFM Structure
6. Project Specific Scope Attributes
7. Scope of Planning Design and Conformance Services (PDC)
8. Design Excellence
9. RFP Procurement Process
10. Questions & Answers

IO Project Team

Ministry of Infrastructure (MOI)

- ▶ Elaine Shin – Director, Project Delivery, OPRS , MOI
- ▶ Rhona Duncan – Manager, Strategic Policy & Planning, OPRS, MOI

Infrastructure Ontario (IO)

- ▶ Denise McNally – Senior Vice President, Public Works
- ▶ Rachael McLeod – Director, Public Works
- ▶ Lauren Baker – Project Manager, Public Works
- ▶ Daniel Kim – Project Coordinator, Public Works
- ▶ Chad Markell – Procurement Director
- ▶ Hana Nikdin– Procurement Manager
- ▶ Jessica Corson- Procurement Specialist
- ▶ Myles Rosenthal – Legal Counsel

Project Schedule

Milestone	Anticipated Date
PDC RFP Release	June 23, 2023
PDC Award	Oct 23, 2023
DBFM RFQ Release	Dec 2023
DBFM RFQ Close	Feb 2024
DBFM RFP Release	July 2024
DBFM RFP Close	Jan 2025
DBFM Commercial and Financial Close	July 2025
Construction Start	July 2025
Substantial Completion	July 2028

Project Overview

- On April 18, 2023, the province announced that the Ontario Science Centre will move to a new custom-built, state-of-the-art facility at the future Ontario Place site to replace the existing facility located at 770 Don Mills Rd, North York, ON.
- The new OSC aims to deliver a unique architectural and energy efficient flagship facility at the future redeveloped Ontario Place site.
- The new facility will consist of a new building with multi-storey, underground parking located on the mainland, and a retrofit of the existing historic Cinesphere and Pod complex.
- In addition to replacing the existing facility, the OSC will be implementing innovative measures to improve access to science programming, embody sustainability principles and enhance operational efficiencies.

IO and MOI Roles

Infrastructure Ontario (IO)

In partnership with OSC, IO's mandate is to deliver the project using the Government of Ontario's P3 Design-Build-Finance-Maintain ("DBFM") model, which includes procuring and executing all its related services. IO's role starts from the project development stage to the end of the DBFM maintenance period.

Ministry of Infrastructure (MOI)

MOI's role is to develop policies and initiatives by working with Infrastructure Ontario to enhance infrastructure delivery, including both public-private partnerships (P3) and other delivery model programs.

Design-Build-Finance-Maintain Structure

The DBFM model involves the private sector consortium (Project Co) accepting responsibility for the design, construction, financing, regular maintenance and rehabilitation of the asset over the contract term to meet pre-defined performance specifications.

Project Co will not be fully paid for construction work following substantial completion but will be paid in instalments over the length of the maintenance term. Because the Project Co is responsible for the maintenance and performance of the facility for 30 years, there is additional incentive to use high-quality and durable materials that will ultimately benefit the both Owner and public.

IO commonly uses this model when appropriate for hospitals, justice facilities, such as courthouses, and transportation projects.

Project Specific Scope Attributes

Service	Description
Underground Parking	<ul style="list-style-type: none"> • This is part of the PDC Fixed Fee. • The below grade parking structure is proposed to be integrated with the new OSC facility, providing up to 2000 parking spaces in a 5-storey underground structure to meet landlord lease obligations. • Preparation is underway for government approval for the parking structure in September 2023.
OSC+	<ul style="list-style-type: none"> • This work is to be carried as separate prices in the PDC price submission. • There are some proposed program enhancements not included in the final Functional Program due to a required reduction in the size of the building/square footage. • These OSC+ elements include: 1) Immersive Experience, 2) Outdoor Experience and 3) Planetarium that will enhance the overall user experience. This scope is part of the September 2023 government submission for approval. • If approved, these elements will become part of the Project's scope and the PDC will be required to include the OSC+ elements in the Output Specifications.
Sustainable Design, Climate Resilience and Energy Modelling	<ul style="list-style-type: none"> • This is part of the PDC Fixed Fee. • All new buildings delivered under the P3 model must optimize opportunities for the conservation of energy and other resources, with the objective of reducing operating and life cycle costs over the duration of the design service life of the asset. • The PDC will follow IO's LEED Guideline and Energy Modeling Guideline to develop energy & GHG facility operational targets, LEED target credits, and energy modeling. • The PDC will participate in climate risk and resilience assessment workshops led by IO and integrate agreed upon resilience recommendations into the Output Specifications.
Indigenous Engagement	<ul style="list-style-type: none"> • This work is carried as a Cash Allowance. • Extensive Indigenous Engagement is ongoing for the Ontario Place Redevelopment. • An allowance will be carried in the PDC contract to account for any project specific Indigenous engagement that may be required (e.g., meetings, consultations, briefings).

Overview

Scope of Planning Design and Conformance Services (PDC)

- Review project reports, any supplied documentation and the Functional Program in detail in order to fully understand all program requirements intended for the Project.
- Complete a performance-based **Output Specifications (OS)** for the project (utilizing IO's OS drafting guidelines), including a new building, multi-story underground parking structure, and renovation of the existing pods, bridge and Cinesphere complex.
- Participate in Project RFP process, attending meetings, providing conformance reviews and feedback.
- Assist IO in the evaluation and selection of the Project Co.
- Following Financial Close, advise IO with respect to Project Co's adherence to, and conformance with, the Output Specifications throughout the Design Development Phase, Construction Documentation Phase, Construction Phase and Post- Construction Phase.

Design Excellence

- The new OSC facility will serve as a flagship building at the newly redeveloped Ontario Place site.
- This presents a unique opportunity to deliver an ambitious architectural landmark building.
- To encourage design excellence, the following enhancements will be adopted in the development of the OS and RFP documents including:
 - Developing slimline Output Specifications that limit prescriptive requirements and allow bidders the freedom to present creative responses to the project requirements.
 - Developing a 'design competition style' RFP process, with a focus on architectural ambition and collaboration during the open period.
 - Adjusting RFP weighting in favour of design components.
- This work is captured in the PDC RFP.

**Request for Proposal (RFP)
Procurement Process and Highlights
(Hana Nikdin, IO)**

RFP Enhancements

RFP Structure

- ▶ The Request for Proposals (RFP) & six (6) Schedules
 - Request for Proposal Main Body (the “Main Body”)
 - Schedule 1 – RFP Data Sheet
 - Schedule 2 – Proposal Submission Form* (including: Appendices A, B1, B2, C, D, and Form 2-1A – Certificate of Officer and Form 2-1B – Certificate of Officer)
 - Schedule 3 – Draft Agreement (including: Appendix A, Attachment 1 to Appendix A)
 - Schedule 4 – Price Form*
 - Schedule 5 – Non-Disclosure Agreement*
 - Schedule 6A –Time Task Matrix without Fees*
 - Schedule 6B –Time Task Matrix with Fees*

The * marked Schedules are available in editable format in MERX.

RFP Enhancements

- ▶ Due to recent experiences in the PDC market, IO has undertaken some refinements to the PDC RFP process; some key items to note:
 - Refined Technical and Financial weightings for evaluation
 - More detailed Technical Criteria
 - Additional subsection added to Section C – Understanding the Assignment and Methodology
 - Section D - Resource Planning has been added as a separate scoring element
 - Within Section D, a formula was introduced to score the TTM
 - Additional mechanism to review prices for inflationary (or deflationary) purposes
 - Altered Financial elements
 - Moved to three pricing elements for evaluation purposes
 - Additional definitions within the Agreement relating to new pricing elements
 - Removal of the Project Specific E&O insurance cost from the total fixed fee evaluated price

PDC RFP Schedule

Step in the Procurement Process	Date
Issue RFP	June 23, 2023
Respondent's Meeting	July 6, 2023
Final date for submission of Respondents' questions	August 8, 2023 before 5:00 p.m. (EST)
Deadline for issuing responses to Respondents' questions	August 15, 2023
Deadline for issuing Addenda	August 15, 2023
Proposal Submission Deadline	August 22, 2023 before 2:00 p.m. (EST)
Identification of Negotiations Respondent	October 4, 2023
Award to Successful Respondent	Week of October 23, 2023

Evaluation Criteria

Evaluation Category	Weighting
Technical Submission	70
A. Respondent Team Experience	10
B. Respondent Team/Key Individual Organization and Experience	20
C. Understanding the Assignment and Methodology	20
D. Resource Planning	20
1. Resource Planning Narrative & Time Task Matrix Approach	5
2. Time Task Matrix Score	15
Financial Submission	30
Planning Phase - Fixed Fee	12
Transaction Phase – Fixed Fee	10
Implementation and Post Implementation Phase – Hourly Rates	8
TOTAL	100

The minimum passing score for the Technical Submission component of the Proposal is 60% or 42 out of 70 points.

PDC Procurement Evaluation Enhancements

► Section D – Resource Planning:

1. Resource Planning Narrative and Approach to Time-Task Matrix – scored by technical evaluators performing qualitative review
2. Time-Task Matrix Score – scored by applying formula-based approach

Time Task Matrix Score:

The TTM Score will be evaluated as follows:

$$\text{TTM Score} = \text{Points} \times (1 - (| (B - A) | \times G) / A)$$

Where:

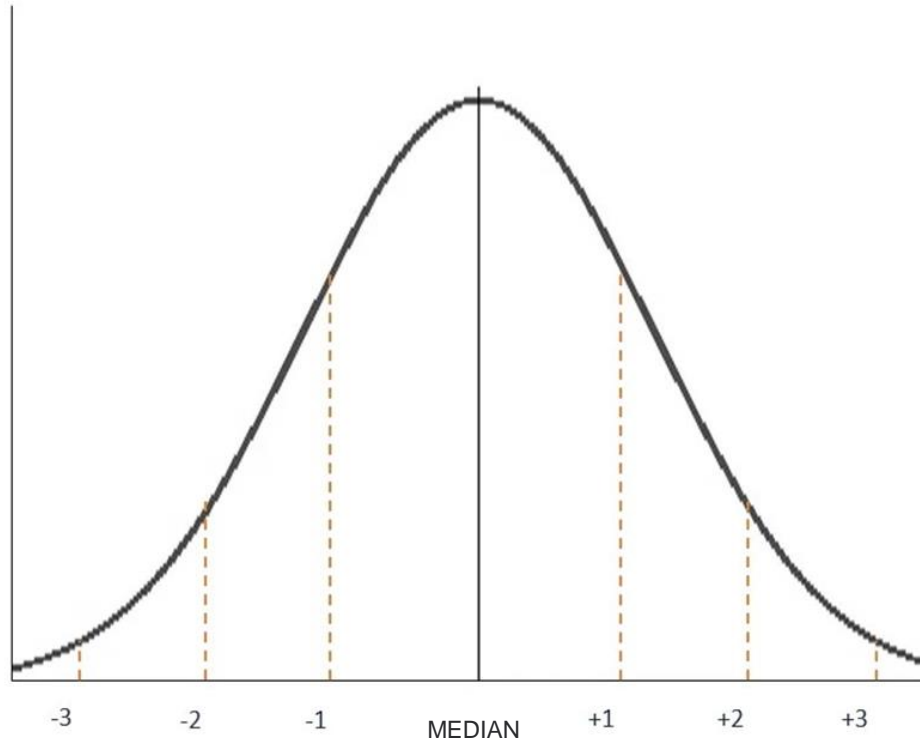
Points = 15

A = Median # of Hours (of all Respondents)

B = Respondent's total number of hours

G = 3 (Gearing)

Time Task Matrix



- ▶ The intent of incorporating Section D is to encourage Respondents to thoroughly consider the roles and effort required to complete the project activities and provide the most accurate estimate for the number of hours required.
- ▶ Under the TTM formula, the further away a Respondent's total number of hours is from the Median total number of hours of all Respondent's, the lower their score will be.
- ▶ Section D is worth 20 points, where 5 points are allocated to the narrative component and the remaining 15 points for the formula.

TTM Formula – Illustration

If $B \geq A$, then,

$$\text{TTM Score} = \text{Points} \times \left(1 - \left(\frac{B - A}{A} \right) \times G \right)$$

$$\text{TTM Score} = 15 \times \left(1 - \left(\frac{60,000 - 50,000}{50,000} \right) \times 3 \right)$$

$$\text{TTM Score} = 6$$

$$\text{Points} = 15$$

$$B = 60,000$$

$$A = 50,000$$

$$G = 3$$

If $B < A$, then,

$$\text{TTM Score} = \text{Points} \times \left(1 - \left(\frac{A - B}{A} \right) \times G \right)$$

$$\text{TTM Score} = 15 \times \left(1 - \left(\frac{50,000 - 40,000}{50,000} \right) \times 3 \right)$$

$$\text{TTM Score} = 6$$

$$\text{Points} = 15$$

$$B = 40,000$$

$$A = 50,000$$

$$G = 3$$

Submission Requirements

RFP Section 4.2 Contents of the Proposal:

- ▶ Technical Submission (suggested maximum 35 pages excluding experience templates) including:
 - Responses for each Section outlined at 4.2 Contents of the Proposal – Technical Submission
 - Schedule 2 Appendix B1 – Team Member Identification and Assignment Experience
 - Schedule 2 Appendix B2 – Corporate Experience for Completed Assignments
 - Schedule 2 Appendix C – Key Individual Experience, including any CV's*
- ▶ Completed and Signed Proposal Submission Form (Schedule 2) including:
 - Appendix A – Participant Conflicts Screening List.
 - Appendix D – References
 - Form 2-1A – Certificate of Officer and Form 2-1B –Certificate of Officer
- ▶ Completed Schedule 4 Price Form
- ▶ Completed Schedule 6A Time Task Matrix without Fees and 6B Time Task Matrix with Fees
- ▶ Proof of Insurance

*The suggested maximum page limit for CVs is 2 pages per individual

Financial Submission Requirements

- ▶ Schedule 4 – Price Form
 - 4.1 Fee Breakdown:
 - Planning Phase – Fixed Fee
 - Transaction Phase – Fixed Fee
 - Implementation & Post-Implementation Phase – Hourly Rate
 - 4.2 Fee Breakdown by Deliverable
 - 4.3 Hourly Rates for all identified members of the Supplier’s team
 - 4.4 OSC Plus Work

- ▶ Schedule 6B Time Task Matrix with Fees

For clarity, the total fees listed in the Time Task Matrix shall match the Schedule 4 Price Form.

Equity, Diversity & Inclusion Enhancements

Reforms to RFP Submission Requirements (Form 2-1 Certificate of Officer)

Background

- In April 2021, Infrastructure Ontario (IO) made changes to its procurement policy to reflect several updates, including a commitment to explore how to leverage IO's platform to influence positive change within the market, as well as the identification of equity, diversity and inclusion (EDI) as a core procurement principle.
- One of the opportunities identified was to incorporate fundamental principles related to EDI into the procurement process for IO's large capital infrastructure procurements.
- We have consulted with various EDI subject matter experts to ensure these principles are incorporated in an informed and thoughtful manner.
- With an emphasis on partnership in mind, we want to ensure to provide the market with additional context and will continue to do so as more opportunities present themselves.

Reforms to RFP Submission Requirements (Form 2-1 Certificate of Officer)

Objectives

- Ensure these principles are incorporated in an informed and impactful manner.
- Entrench these values in all our engagements with our vendors, prospective vendors and contracting counterparts.
- Continue to challenge ourselves and industry to redefine and provide recognition, opportunity and safety for equity-deserving groups.
- Leverage IO's platform to help push innovative practices in the marketplace.

The benefits of placing emphasis on EDI principles in our procurement process will include:

- ❑ Promotion of equity, diversity, and inclusion in IO's supply chain.
- ❑ Achieving improved outcomes by growing our market's workforce and fulfilling our responsibility to Ontarians to ensure representation of a diverse labour force at all levels of an organization.
- ❑ Emphasizing the importance of actively confronting racism, discrimination and harassment in the workplace.

EDI Enhancements to RFP Certificate of Officer

- ▶ The EDI enhancements made to the Request for Qualification (RFP) Certificate of Officer is the first in a series of updates we will be implementing into our procurement processes.
- ▶ As part of the Proposal requirements, the primary Respondent entity(ies) will be required to submit the EDI enhanced RFP Certificate of Officer.
- ▶ Any additional information provided in response to the RFP Certificate of Officer will be reviewed by EDI subject matter experts to determine any potential course of action.
- ▶ Guidance may be provided to the respondent to help ensure its ability to address issues raised in a timely manner.

Changes to the RFP Certificate of Officer include:

- ❑ Attestation confirming the Respondent has policies, processes and practices designed to confront workplace-based racism, discrimination, harassment and hate speech and to create safe-spaces and opportunities for equity-deserving groups;
- ❑ Listing of ongoing claims, complaints and grievances before any Canadian court, board, arbitrator or tribunal, or internal and external investigations, in relation to allegations of racism, discrimination, harassment and hate speech; and
- ❑ Listing of convictions, judgements and arbitration awards rendered by a Canadian court, board, arbitrator or tribunal, or internal and external investigations rendering an adverse finding, within 5 years.

Disclaimer

The information contained herein is for information purposes only and does not substitute the formal RFP process. Discussion at the RFP Respondent's Meeting are informal and are expressly not intended to be binding on the Sponsors. While efforts have been made to ensure the accuracy of the descriptions and business data, the Sponsors do not warrant the accuracy or completeness of this document or the information it contains or discussions at the RFP Respondents' Meeting and are not responsible or liable for any perceived or actual misinformation resulting from this document.

Conflicts of Interest / Unfair Advantage

- Respondents' duty under RFP Process to report concerns regarding Conflict of Interests (COI) with Sponsors, Ineligible Parties, and/or Affiliates.
- Where there is a failure to disclose a COI or a failure to comply with the Sponsors' mitigation measures, the Sponsors retain the rights to:
 - **Remove or exclude a Respondent**
 - **Remove or replace Team Members, and/or Key Individuals**

Q&A Period

Contact Information

- Respondents who have questions are encouraged to submit the RFI to the RFP contact person, via the Q&A function on MERX.
- IO's official response will be posted on MERX in the Q&A function or in an Addendum where applicable.
 - ❑ You are strongly encouraged to review these Answers as they are posted - you will also see the Question – as they may provide you with additional information or resolve a query you may have

Contact Persons:

Hana Nikdin

Procurement Manager

Infrastructure Ontario

Hana.Nikdin@infrastructureontario.ca



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