

Schedule A

SCHEDULE A – DATA SHEET

SECTION	ITEM
A1.00 – General Information	
A1.01 – Description of Goods and/or Services	Description of Goods and/or Services: The City is seeking to procure an Investment Planning and Decision Support System
A1.02 – RFP Number	The RFP Number is 914-2023 .
A1.03 – Contact Person and Requests for Information	The name of the Contact Person is: Megan Jakilazek The Contact Person may be contacted via email: mjakilazek@winnipeg.ca

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A2.00 – RFP Information																													
A2.01 – Timetable	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" data-bbox="498 350 1401 401" style="text-align: center;">TIMETABLE</th> </tr> </thead> <tbody> <tr> <td data-bbox="498 401 950 457">Issuance of RFP Documents</td> <td data-bbox="950 401 1401 457" style="text-align: center;">January 8, 2024</td> </tr> <tr> <td data-bbox="498 457 950 543">Stage 1 - Registration Deadline for Proponents Meeting</td> <td data-bbox="950 457 1401 543" style="text-align: center;">January 12, 2024</td> </tr> <tr> <td data-bbox="498 543 950 600">Stage 1 - Proponents Meeting</td> <td data-bbox="950 543 1401 600" style="text-align: center;">January 15, 2024</td> </tr> <tr> <td data-bbox="498 600 950 686">Stage 1 - Deadline for Proponents to submit RFIs</td> <td data-bbox="950 600 1401 686" style="text-align: center;">January 16, 2024</td> </tr> <tr> <td data-bbox="498 686 950 772">Stage 1 - Deadline for posting RFI responses</td> <td data-bbox="950 686 1401 772" style="text-align: center;">January 17, 2024</td> </tr> <tr> <td data-bbox="498 772 950 858">Stage 1 - Deadline for issuance of Addenda for Stage 1</td> <td data-bbox="950 772 1401 858" style="text-align: center;">January 17, 2024</td> </tr> <tr> <td data-bbox="498 858 950 915">Stage 1 - Intent to Bid Deadline</td> <td data-bbox="950 858 1401 915" style="text-align: center;">January 22, 2024, 12:00 CT</td> </tr> <tr> <td data-bbox="498 915 950 1001">Deadline to submit confidentiality agreement</td> <td data-bbox="950 915 1401 1001">Not Applicable</td> </tr> <tr> <td data-bbox="498 1001 950 1058">Anticipated date for Stage 2 – Short List</td> <td data-bbox="950 1001 1401 1058" style="text-align: center;">February 2024</td> </tr> <tr> <td data-bbox="498 1058 950 1115">Anticipated date for Stage 3 - Demonstration</td> <td data-bbox="950 1058 1401 1115" style="text-align: center;">February 2024</td> </tr> <tr> <td data-bbox="498 1115 950 1192">Anticipated date for Stage 4 - Pricing Proposal Submission Deadline</td> <td data-bbox="950 1115 1401 1192" style="text-align: center;">March 2024</td> </tr> <tr> <td data-bbox="498 1192 950 1249">Anticipated Stage 5 – Negotiations Proponent selection</td> <td data-bbox="950 1192 1401 1249" style="text-align: center;">March 2024</td> </tr> <tr> <td data-bbox="498 1249 950 1306">Anticipated Stage 6 – Award Final Agreement execution date</td> <td data-bbox="950 1249 1401 1306" style="text-align: center;">April 2024</td> </tr> </tbody> </table>	TIMETABLE		Issuance of RFP Documents	January 8, 2024	Stage 1 - Registration Deadline for Proponents Meeting	January 12, 2024	Stage 1 - Proponents Meeting	January 15, 2024	Stage 1 - Deadline for Proponents to submit RFIs	January 16, 2024	Stage 1 - Deadline for posting RFI responses	January 17, 2024	Stage 1 - Deadline for issuance of Addenda for Stage 1	January 17, 2024	Stage 1 - Intent to Bid Deadline	January 22, 2024, 12:00 CT	Deadline to submit confidentiality agreement	Not Applicable	Anticipated date for Stage 2 – Short List	February 2024	Anticipated date for Stage 3 - Demonstration	February 2024	Anticipated date for Stage 4 - Pricing Proposal Submission Deadline	March 2024	Anticipated Stage 5 – Negotiations Proponent selection	March 2024	Anticipated Stage 6 – Award Final Agreement execution date	April 2024
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A2.02 – Background Information	Background Information will be provided to the Proponents on MERX.																												
A2.03 – Maximum number of Proponents that can be progressed to Stage 2	5																												

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A2.04 – Evaluation Criteria for additional screening (if applicable)	Evaluation Criteria		Weight
	Firm profile and experience of Proponent and subcontractors		30
	Post-project support services		15
	Modules and Functionality		40
	Differentiating functional requirements		15
A2.05 – Evaluation Criteria for Stage 2 – Short List	Evaluation Criteria		Weight
	The extent to which the Proponent's Solution meets the City's Solution Objectives		89.7
	Firm profile and experience		10.3
A2.06 Maximum number of Proponents that can be progressed to Stage 3	3		
A2.07 – Evaluation Criteria for Stage 3 - Demonstration	Evaluation Criteria		Weight
	The extent to which the demonstration shows the Shortlisted Proponent's Solution meets the City's Solution Objectives		85.4%
	The extent to which the demonstration shows the Shortlisted Proponent's Solution meets the City's Professional Services Objectives:		8.5% (subtotal of 1, 2, 3)
	1)	Project Plan, Methodology and Schedule	3.7%
	2)	Data migration approach and access to historical data	2.4%
	3)	Post project support and services	2.4%
	Experience of Key Personnel Assigned to the Project		6.1%
A2.08 – Minimum Passing Score on Stage 3 - Demonstration	The minimum passing score on the Stage 3 - Demonstration is 70% .		

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A2.09 – Weighting for Components of Overall Score	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 80%; text-align: left;">Component of Overall Score</th> <th style="width: 20%; text-align: center;">Weight</th> </tr> </thead> <tbody> <tr> <td style="background-color: #f2f2f2;">Stage 2 – Short List (or optional criteria)</td> <td style="text-align: center;">8</td> </tr> <tr> <td>Firm profile and experience</td> <td style="text-align: center;">8</td> </tr> <tr> <td style="background-color: #f2f2f2;">Stage 3 - Demonstration</td> <td style="text-align: center;">82</td> </tr> <tr> <td>The extent to which the demonstration shows the Shortlisted Proponent’s Solution meets the City’s objectives con</td> <td style="text-align: center;">70</td> </tr> <tr> <td>Project Plan, Methodology and Schedule</td> <td style="text-align: center;">3</td> </tr> <tr> <td>Experience of Key Personnel Assigned to the Project</td> <td style="text-align: center;">5</td> </tr> <tr> <td>Data migration approach and access to historical data</td> <td style="text-align: center;">2</td> </tr> <tr> <td>Post project support and services</td> <td style="text-align: center;">2</td> </tr> <tr> <td style="background-color: #f2f2f2;">Stage 4 - Price</td> <td style="text-align: center;">10</td> </tr> <tr> <td>Price (Implementation + 5 year cost)</td> <td style="text-align: center;">8</td> </tr> <tr> <td>Pricing model scalability</td> <td style="text-align: center;">2</td> </tr> </tbody> </table>	Component of Overall Score	Weight	Stage 2 – Short List (or optional criteria)	8	Firm profile and experience	8	Stage 3 - Demonstration	82	The extent to which the demonstration shows the Shortlisted Proponent’s Solution meets the City’s objectives con	70	Project Plan, Methodology and Schedule	3	Experience of Key Personnel Assigned to the Project	5	Data migration approach and access to historical data	2	Post project support and services	2	Stage 4 - Price	10	Price (Implementation + 5 year cost)	8	Pricing model scalability	2
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A2.10 – Maintaining Prices and Proposal Commitments	As per RFP																								
A2.11 – General Proponents Meeting	The City encourages all Proponents to attend the General Proponents Meeting to learn about the new Information Technology (IT) RFP process and what to expect at each stage.																								
A2.12 – Prohibited Contacts	Not Applicable.																								
A2.13 – Ineligible Persons	Not Applicable.																								
A2.14 – Confidentiality Agreement	Proponents are not required to execute a confidentiality agreement.																								
A2.15 - Disclosure	<p>Companies that provided cost estimates and/or descriptions or demos relating to the Goods and/or Services that are the subject of this RFP document:</p> <ol style="list-style-type: none"> 1. Planview (provided information on their services, a demo) 2. Clarity PPM (provided information on their services, a demo) 3. Arcadis (provided information on their services, a demo) 4. Brightly (provided information on their services, a demo) 5. Anaplan (provided information on their services) 																								

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	<ol style="list-style-type: none"> 6. CopperLeaf (provided information on their services) 7. e-Builder (provided information on their services) 8. GenSight (provided information on their services) 9. Hexagon PPM (provided information on their services) 10. IDS Infrastructure Data Solutions (provided information on their services) 11. Meisterplan (provided information on their services) 12. Oracle Enterprise Planning and Budgeting System (ePBCS) (provided information on their services) 13. PowerPlan AIP (provided information on their services) 14. PSD (CityWide) (provided information on their services) 15. SAP-PPM (provided information on their services) 16. Wicresoft (provided information on their services)
A2.16 – One Proposal Per Person	There are no exceptions to RFP 7.4

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A3.00 – Contract and Goods and/or Services Information			
A3.01 – Contract Term and Extensions	Contract Details		
	<table border="1" style="width: 100%;"> <tr> <td style="width: 60%;">Contract Length</td> <td> Professional Services: from date of Award until Go-Live Hosted Services: 1 year from Go-Live </td> </tr> </table>	Contract Length	Professional Services: from date of Award until Go-Live Hosted Services: 1 year from Go-Live
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A3.02 – the City Policies	Records Management By-Law 123/2020; AS-006; AS-015		
A3.03 – Data Sensitivity Level	2		
A3.04 – Limit on Liability	The limit on liability cap is twice the value of the first year of Contract Price (includes Professional Services and Hosted Services for first year)		
A3.05 – Insurance	<p>The Consultant shall provide evidence of the following:</p> <ul style="list-style-type: none"> (a) Professional Errors and Omissions Liability in the amount of not less than \$500,000 per claim and \$1,000,000 in the aggregate. <ul style="list-style-type: none"> i) Professional Liability to remain on file for 12 months following completion of the services. ii) Policies to be taken out with insurers licensed to carry on business in the province of Manitoba. iii) Deductibles to be the responsibility of the Consultant 		