

**February 26, 2025****Addendum No. 03****File Reference Number: RFP 2025 001****Title: Business Case Development Support****RE: Clarifications/Questions**

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Please refer to the following information/clarification:

**Item 1:** Schedule 2-A of the RFP (RFP Data Sheet) indicates that the price will be evaluated based on a combination of the rates provided and the respondents responses to the scenarios.

- (a) Could ONTC provide further details on how the price form will be evaluated (i.e., allocation of points for hourly rates, blended rates, etc.)?

**Answer:** ONTC has now amended Part 2 – Schedule 2-A - RFP Data Sheet. Please replace Part 2 – Schedule 2-A of the RFP package with the Schedule 2-A attached to this addendum.

You will note that ONTC has amended the evaluation criteria. Price will now be worth 15 points and will be calculated using the blended/average hourly rates provided on Proposal Form 1.

- (b) Proposal Form 4 requests estimated staff and hours to complete the business cases noted as the “Scenarios” for the proposal response. Could ONTC provide further details on how the proposed level of effort will be evaluated in alignment with Schedule 2-A?

**Answer:** The scenarios will no longer be used to calculate price; however, they will continue to be used to provide a score for demonstrated understanding of the mandate and approach to scenarios. ONTC expects respondents to utilize their industry expertise and experience to put forward the required staff and hours to complete the scenarios. ONTC intends to use these scenarios and pricing as a baseline for future Statements of Work issued under the MSA with the successful respondent. The staff proposed should align with the key personnel presented in the proposal and have the expertise and qualifications to complete the required business cases.

### Project Scope & Deliverables

**Item 2:** Can ONTC provide more details on the expected breakdown of effort between developing new business cases and updating existing ones?

**Answer:** The effort required for developing new business cases and updating existing ones will vary on a case-by-case basis.

**Item 3:** Will ONTC provide a preferred template or framework for business case development, or should the consultant propose a methodology?

**Answer:** It will be a combined effort as ONTC does have a template for business cases, however, ONTC will work with the successful respondent to update as necessary depending on requirements.

**Item 4:** Are there specific priority projects that ONTC intends to address first under this contract?

**Answer:** Yes, there are some priority business cases that are required to be completed.

**Item 5:** How does ONTC define a "complete" business case? Are there specific evaluation criteria or milestones for approval?

**Answer:** ONTC does have a template for business cases, however, ONTC will work with the successful respondent on updating as necessary.

#### Team Composition & Resource Requirements

**Item 6:** The RFP requires a core team of SMEs—can additional resources be subcontracted or engaged post-award without prior listing in the proposal?

**Answer:** Yes, however, the rates proposed in the successful respondent's submission would apply.

**Item 7:** Will ONTC allow part-time resources for certain roles, or does it expect full-time dedicated personnel?

**Answer:** ONTC would ask that the successful respondent manage resources as needed.

**Item 8:** Can ONTC clarify the level of consultant involvement in stakeholder engagement, such as the number of workshops or key stakeholders to be consulted?

**Answer:** This would be dependent on the business case being drafted and will be discussed when a specific Statement of Work is issued under the MSA with the successful respondent.

#### Financial & Pricing

**Item 9:** Should travel costs for on-site meetings be included in the hourly rates, or can they be billed separately?

**Answer:** Should a Statement of Work require the consultant to be onsite the Travel, Meal and Hospitality Expenses Directive (<https://www.ontario.ca/page/travel-meal-and-hospitality-expenses-directive>) will apply to all travel costs and must be agreed to by ONTC.

**Item 10:** If ONTC extends the contract beyond the initial term, how will CPI-based pricing adjustments be calculated and negotiated?

**Answer:** CPI would be calculated on the hourly rates provided for year one, based on Bank of Canada annual CPI rate.

**Item 11:** Will ONTC consider fixed-price engagements for specific business cases, or is the contract structured as strictly hourly-based?

**Answer:** ONTC is requesting hourly rates in respondents' submissions, however, each Statement of Work will have a fixed price as provided by the successful respondent, which is reflective of the hourly rates in their proposal.

### Business Case Evaluation & Metrics

**Item 12:** Are there specific financial, social, or operational KPIs that ONTC prioritizes when evaluating business cases?

**Answer:** ONTC prioritizes metrics based on each business case, discussed with the successful respondent beforehand.

**Item 13:** Will the consultant have access to past ONTC business cases to align methodologies and expectations?

**Answer:** Yes, previous business cases could be shared as needed.

**Item 14:** What is the typical approval process and decision timeline for business cases once submitted?

**Answer:** This is dependent on the value of the business case submitted.

### Vendor Selection & Contract Management

**Item 15:** What level of involvement is expected from ONTC's Business Planning & Intelligence team in supporting business case development?

**Answer:** ONTC's Business Planning & Intelligence team will be the main contact for the successful respondent and will lead all business case input/review along with the vendor.

**Item 16:** Will the awarded consultant be required to train ONTC staff on business case methodologies or tools?

**Answer:** Yes, that would be the expectation.

**Item 17:** Will ONTC conduct quarterly reviews of the consultant's performance, and how will priorities be adjusted over the contract period?

**Answer:** ONTC has a vendor performance evaluation policy in which it follows bi-annual reviews. ONTC will rely on the Statements of Work to assist in prioritizing each business case during the contract term.

**Item 18:** Will the engagement be structured as a single master contract with multiple Statements of Work (SOWs)?

**Answer:** Yes.

### Remote vs. On-Site Work

**Item 19:** Can the majority of the business case development be conducted remotely, or is regular in-person attendance required?

**Answer:** In-person meetings may be required with certain stakeholders depending on the business case, this would be expressed within the Statement of Work.

**Item 20:** Are there specific locations where the consultant is expected to work (e.g., North Bay, Toronto)?

**Answer:** The consultant may be required to travel throughout ONTC's locations.

**Item 21:** Will ONTC cover travel and accommodation expenses for in-person meetings, or should these be included in the pricing proposal?

**Answer:** Should a Statement of Work require the consultant to be onsite the Travel, Meal and Hospitality Expenses Directive (<https://www.ontario.ca/page/travel-meal-and-hospitality-expenses-directive>) will apply to all travel costs and must be agreed to by ONTC.

This addendum hereby forms part of the RFP.

Regards,

Ashley Commanda  
Manager, Public Procurement  
[Ashley.commanda@ontarionorthland.ca](mailto:Ashley.commanda@ontarionorthland.ca)

**PART 2 – REQUEST FOR PROPOSALS  
 SUMMARY OF REQUIREMENTS  
 SCHEDULE 2-A *continued*  
 RFP DATA SHEET**

RFP 2025 001 Business Case Development Support	
<b>Contact Details</b>	
Contact Person	Ashley Commanda, Manager, Public Procurement
Contact Information	555 Oak Street East North Bay, Ontario, P1B 8L3 <a href="mailto:Ashley.commanda@ontarionorthland.ca">Ashley.commanda@ontarionorthland.ca</a> (705) 472-4500 ext. 398
<b>Proposal Detail</b>	
Site Visit	There will not be a Respondents' Meeting. Respondents shall seek any clarifications up to 4 Business Days prior to the Submission Deadline Date and Time.
Validity of Proposals	90 days following the Submission Deadline
Format of Submission	Respondents shall submit their Proposal through MERX Electronic Bid Submissions (EBS). Refer to Part 1, Request for Proposals, Section 5.1 (1) (a). <b>MERX EBS does not allow Proposals to be uploaded after the Submission Deadline; therefore, Respondents shall ensure they allow sufficient time to upload the documents.</b>  Proposals which are submitted by facsimile transmission, by email or by electronic means other than MERX <u>will NOT</u> be considered.
Two-Envelope Process	This procurement will <u>not be</u> a two-envelope process.
Distribution Method	The RFP Documents will be posted on the Ontario Northland website and MERX. Any addenda to the RFP will be posted in these locations.

**PART 2 – REQUEST FOR PROPOSALS  
 SUMMARY OF REQUIREMENTS  
 SCHEDULE 2-A *continued*  
 RFP DATA SHEET**

**RFP 2025 001  
 Business Case Development Support**

**Proposal Detail *continued***

Submission Requirements	Respondents are required to submit <b><u>all</u></b> of the material documents listed below as part of their Proposal. Respondents shall confirm they have included the documents listed below with their Proposal by placing a checkmark in the column “Included in Proposal”. If the Respondent fails to include a document listed below as being “Material”, the respondent may be disqualified in accordance with section 6.2 (3) of the RFP.		
	<b>Item</b>	<b>Included in Proposal (indicate with ✓)</b>	<b>Item is classified as Material</b>
	This checklist		
	Proposal Form 1 Proposal Submission Form		Material
	Proposal Form 2 Respondent’s General Information		Material
	Proposal Form 3 Experience and Qualifications		Material
	Proposal Form 4 Understanding of the Mandate		Material
	Proposal Form 5 References		Material
	Proposal Form 6 Compliance with Contract Documents		Material
	Proposal Form 7 Claims		

**PART 2 – REQUEST FOR PROPOSALS  
 SUMMARY OF REQUIREMENTS  
 SCHEDULE 2-A *continued*  
 RFP DATA SHEET**

<b>RFP 2025 001 Business Case Development Support</b>			
<b>Important Dates</b>			
Publication Date	Friday, January 17, 2025		
Participation Registration Form	Complete and submit to the Contact Person as soon as possible		
Deadline for Additional Information Request	Four (4) full Business Days prior to the Submission Deadline		
Submission Deadline Date and Time	Wednesday, March 5, 2025, at 2:00:00 p.m. (EST)		
<b>Procedure of Selection</b>			
<b>Mandatory Requirements</b>	Respondents must satisfy all of the Mandatory Requirements listed below. Respondents will receive a pass/fail for each Mandatory Requirement. Respondents who fail any of the Mandatory Requirements will be disqualified from the RFP Process.		
	<b>Mandatory Requirement</b>	<b>Pass</b>	<b>Fail</b>
	Respondent has submitted all of the material documents as specified in the Submission Requirements listed in Part 2, Request for Proposals, Summary of Requirements, RFP Data Sheet		
	Proposal was submitted on MERX before the Submission Deadline Date and Time.		
	Respondent must be a Canadian Business or domiciled in an international trade partner.		

**PART 2 – REQUEST FOR PROPOSALS  
 SUMMARY OF REQUIREMENTS  
 SCHEDULE 2-A *continued*  
 RFP DATA SHEET**

RFP 2025 001 Business Case Development Support		
Procedure of Selection <i>continued</i>		
Evaluation General Procedure	Respondents must score a <u>minimum of 70%</u> for both Experience and Qualifications and Understanding of the Mandate to qualify for shortlist consideration. Respondents who fail to score a minimum of 70% in either of these categories will be disqualified from the RFP Process.	
Evaluation Criteria	<b>Description</b>	<b>Weight</b>
	<p><b>Price</b>                      ONTC will use the following formula to calculate the score for price:</p> <p style="text-align: center;">Lowest price of all Proposals ÷ price of Respondent x 15 =                      Score</p> <p>If ONTC is of the opinion that the price submitted does not accurately cover the scope of work requested by ONTC, then ONTC reserves the right in its sole discretion not to consider that price as the lowest price of all Respondents. ONTC reserves the right to disqualify a Proposal that is over the allocated budget.</p>	15
	<p><b>Experience and Qualifications</b></p> <ul style="list-style-type: none"> <li>• The Respondent shall provide a company profile and indicate the length of time (number of years) the company has been providing similar services. Include company history, office location(s), corporate operating philosophy and description of the specific services offered and specialties. – <b>5 points</b></li> <li>• The Respondent must provide a concise Executive Summary of the Proposal for Ontario Northland’s Evaluation Team to understand the highlights of the services offered by the Respondent. – <b>5 points</b></li> <li>• The Respondent shall provide resumes and direct experience of the proposed team and an organizational chart. Indicate the responsibilities each will have in this mandate and how long each has been with your company. Identify subconsultants you intend to use and the services they will perform. – <b>5 points</b></li> <li>• The Respondent shall provide proven experience in developing business cases for organizations of similar size and complexity. – <b>5 points</b></li> <li>• The Respondent shall demonstrate experience in the following industries: Rail Freight Transportation, Passenger Services and Remanufacturing. – <b>5 points</b></li> <li>• The Respondent shall demonstrate expertise in financial analysis, risk assessment, and strategic planning. – <b>5 points</b></li> </ul>	



**PART 2 – REQUEST FOR PROPOSALS  
 SUMMARY OF REQUIREMENTS  
 SCHEDULE 2-A *continued*  
 RFP DATA SHEET**

**RFP 2025 001  
 Business Case Development Support**

**Procedure of Selection – *continued***

Evaluation Criteria	<p><b>Experience and Qualifications (<i>continued</i>)</b></p> <ul style="list-style-type: none"> <li>• The Respondent shall demonstrate strong communication and facilitation skills to engage with diverse stakeholders effectively.                      - <b>5 points</b></li> <li>• The Respondent shall supply a minimum of three (3) detailed case studies or examples with hours documented for relevant business cases completed highlighting pertinent experience – <b>15 points</b></li> </ul>	50
	<p><b>Demonstrated Understanding of the Mandate and Approach to Scenarios</b></p> <ul style="list-style-type: none"> <li>• Provide a detailed description of your understanding of the mandate and the associated deliverables – <b>15 points</b></li> <li>• Provide a detailed written narrative approach and methodology of how you will execute each statement of work under the mandate. Include a description of any proprietary software that will be used to complete the work. – <b>10 points</b></li> <li>• Scenarios demonstrate consultant is qualified to complete a variety of projects and meets Ontario Northland's requirements. – <b>20 points</b></li> </ul>	45
	<b>Subtotal</b>	<b>110</b>