



François Pouliot
Director, Procurement Services

Directeur, Services de l'approvisionnement

Financial Services
Montréal (Québec)
Email: francois.pouliot@mcgill.ca

Services financiers
Montréal (Québec)

TEL: (514) 398-2658

Subject: DIRECTIVE Evaluating Bidder Team Depth (Professional Services)

AUTHORITY

The present Directive is issued under the authority assigned to Procurement Services by the Procurement Policy.

PART I – PURPOSE AND SCOPE

- 1.1 The selection of suppliers for professional services almost always includes a quality evaluation, a significant portion of which focuses on the qualifications of the key members of the team assigned to the contract.
- 1.2 However, professional services firms can use their top talent to win new contracts, presenting them as the key members, and then transfer them to another new contract, replacing them with professionals whose qualifications have not been the object of any evaluation.
- 1.3 Because the evaluation of the key members is such a fundamental component of the selection process, for it (and following contract management phase) to be equitable, the University must make sure that the depth and / or the firms' ability to maintain talent depth are sufficient to preserve the qualifications of the proposed, "first choice" key members.
- 1.4 To ensure that the evaluation of talent depth and / or ability to maintain talent depth are duly considered as part of the selection process for providers of professional services, the Director of Procurement Services hereby issues this **Directive**.

PART II - INSTRUCTIONS

- 2.1 Whenever a quality evaluation will be held as part of the selection of a provider of professional services, the quality criterion presented in Appendix A to this Directive will be included. Take note of the notions in blue font, which are bidder response sheets and quality demonstration components that are required for this criterion to fulfill its objective.

DIRECTIVE Evaluating Bidder Team Depth (Professional Services)

APPENDIX A

(English version follows)

Évaluation de la profondeur en cas de remplacement

Le soumissionnaire doit utiliser le formulaire « [Qualifications des Membres-clés et profondeur](#) » pour présenter l'équipe proposée ainsi que leurs remplaçants identifiés, advenant des absences ou des départs imprévus, afin de démontrer que l'entreprise possède l'expérience et l'expertise dans une profondeur suffisante pour mettre en œuvre la solution et soutenir le projet majeur de l'Université McGill. Le soumissionnaire doit également inclure les CV des ressources qui y sont listées. Le formulaire « [Modèle de CV](#) » doit être utilisé.

La qualité de la composition de l'équipe (incluant les membres remplaçants pré-identifiés) sera évaluée sur :

- Leur expérience pertinente sur ce type de projet ;
- Le juste équilibre des qualifications des ressources au sein de l'équipe proposée ;
- La proportion de leur temps de travail consacrée au contrat, en relation avec la distribution de l'effort de mise en œuvre inscrite au [Plan de mise en œuvre](#) ;
- Les emplacements d'où les ressources proposées rempliront leurs responsabilités.

Le soumissionnaire doit enfin fournir la procédure qu'il maintiendrait pour assurer la transition des responsabilités des Membres-clés à leurs remplaçants désignés (ainsi qu'à d'autres remplaçants non-préalablement identifiés, si la profondeur de l'entreprise ne permettait pas de désigner des remplaçants pour tous les Membres-clés) et l'ajout de nouveaux membres à son équipe au cours du projet. Cette procédure sera évaluée sur la capacité qu'elle fournit à l'entreprise de continuer à fournir sa prestation contractuelle avec le moindre effet possible sur son rendement pendant ces transitions.

DIRECTIVE Evaluating Bidder Team Depth (Professional Services)

APPENDIX A

Depth assessment in case of replacement

The bidder must use the "[Qualifications of Key Members and Depth](#)" form to present the proposed team as well as their identified replacements, in the event of absences or unforeseen departures, in order to demonstrate that the company has the experience and expertise in sufficient depth to implement the solution and support McGill University's major project. The bidder must also include the CVs of the resources listed therein. The "[Model CV](#)" form must be used.

The quality of the team composition (including pre-identified replacement members) will be evaluated on:

- Their relevant experience on this type of project;
- The right balance of resource qualifications within the proposed team;
- The proportion of their working time devoted to the contract, in relation to the distribution of the implementation effort recorded in the [Implementation Plan](#);
- The locations from which the proposed resources will fulfill their responsibilities.

Finally, the tenderer must provide the procedure it would maintain to ensure the transition of the responsibilities of the Key Members to their designated replacements (as well as to other replacements not previously identified, if the depth of the company did not allow designate replacements for all Key Members) and the addition of new members to its team during the project. This procedure will be evaluated on the ability it provides to the company to continue to provide its contractual service with the least possible effect on its performance during these transitions.