

**Negotiated Request for Proposals
for
Provision of School Crossing Guards Services
for the Various Locations within the
City of Toronto**

Fairness Monitor's Report

May 1, 2023



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1. Project Highlights

1.1 Introduction and Project Background

The City of Toronto (the “City”) released a Negotiated Request for Proposals # Doc3823446646 (“nRFP”) on January 20, 2023 to qualified firms with experience in deploying large volumes of personnel to multiple locations for the purposes of shift work on a daily basis, to submit proposals for the provision of School Crossing Guard Services in the City.

1.2 Scope of the Fairness Monitor Engagement

P1 Consulting was retained in January 2023 to perform fairness monitoring services and provide an independent attestation on the nRFP procurement process. Our mandate was to review and monitor the bid documents and communications, provide advice on best practices, review and monitor the evaluation and decision-making processes that are associated with the nRFP to ensure fairness, equity, objectivity, transparency and adequate documentation throughout the evaluation process. We are also to attend, observe and provide guidance at City meetings, as well as Supplier interactions. In particular, in our role as Fairness Monitor, we ascertained that the following steps were taken to ensure an open, fair and transparent process:

- **Review of the nRFP and Addenda:**
P1 Consulting reviewed the nRFP and addenda, as required, and all other documents related to the procurement process to ensure that the requirements were met.
- **Review of Questions and Answers (Q&A), Clarification Questions and the Responses:**
P1 Consulting reviewed all Q&As and the responses submitted to the Suppliers. P1 Consulting also reviewed any clarifying questions submitted by City along with their responses.
- **Review of Evaluation Criteria and Procedures:**
P1 Consulting reviewed the evaluation criteria and procedures for the nRFP to ensure that the requirements were met.
- **Advice on Best Practices:**
P1 Consulting attended training sessions to ensure that all project team members were provided with briefings on best practices including the principles and duties of fairness, care and protection of confidential information, avoidance and disclosure of conflict of interest, bias and undue influence, scoring procedures and sign-off on individual scoring sheets, preparation, treatment and retention of evaluation documents.

- **Evaluation Meetings:**

P1 Consulting observed and documented evaluation meetings, including the evaluation training session, Presentations/Demonstrations and the consensus sessions. Additionally, during the evaluation process, we provided verbal and written advice with respect to fairness, objectivity, consistency of process, conflict of interest and confidentiality to ensure strict accordance with the specifications and criteria set out in the nRFP documents.

- **Supplier Interaction:**

P1 Consulting attended and monitored all information sessions, presentations, and commercially confidential meetings (“CCMs”) with Suppliers.

All of the tasks above were completed in a manner that was fair, open and transparent.

2. Competitive Selection Process – Request for Proposals

2.1 Development of the Request for Proposals

P1 Consulting reviewed the nRFP prior to it being posted to the Suppliers and all of our comments related to fairness were satisfactorily addressed by City. We confirm that, from a fairness perspective, the requirements were clear and the nRFP provided the Suppliers a fair process.

2.2 nRFP Open Period Process

Throughout the nRFP open period, the City responded to the questions from the Suppliers and issued addenda to provide greater clarity on the requirements and process. P1 Consulting reviewed all documents that were posted to confirm that they were acceptable from a fairness perspective. The City held a Pre-Bid Information Meeting with Suppliers on January 31, 2023, P1 Consulting reviewed and commented on the presentation materials in advance, from a fairness perspective, and monitored the meeting.

2.3 Evaluation Preparation

The City developed fulsome evaluation procedure documentation in advance of the evaluation process, which was review and approved by the Fairness Monitor. All participants in the evaluation process were required to participate in a training session in preparation for their role in the process, which described roles and responsibilities and the approach to the evaluation. Each evaluation participant was required to sign a participant undertaking, which included a continued commitment to the avoidance of conflicts and respect of confidentiality commitments. Project participants were notified of the appointment of a Fairness Monitor. There were no conflicts identified of which we were aware, which prevented a party from participating in the nRFP evaluation.

2.4 Proposal Receipt

The nRFP Closing Date was February 21, 2023, at 12:00 noon (Local Toronto Time). As per the nRFP, bids must have been submitted through the City Online Procurement System prior to the Closing Deadline for them to be compliant. Ten (10) Bids were received in advance of the Closing Deadline through the City Online Procurement System from the following Suppliers:

- SQM Janitorial Services Inc.
- Synergy Protection Group Inc.
- THE UNIT C.G.M.C Limited.
- The West Egg Group Security Services
- Valguard Security Inc
- A.S.P. Incorporated
- Carraway Inc.

- Neptune Security Services Inc.
- Ottawa Safety Council
- Safety First Security Services Inc

The evaluation was conducted according to the following stages:

1. Stage 1 – Mandatory Submission Requirements
2. Stage 2 – Technical Proposal, Presentation and Rated Evaluations
3. Stage 3 – Pricing and Initial Rankings
4. Stage 4 – CCM and BAFO
 - a. Stage 4A – Commercially Confidential Meetings
 - b. Stage 4B – Best and Final Offer (BAFO)

2.5 Stage 1 – Mandatory Submission Requirements

Prior to releasing the proposals to the evaluator, the City reviewed each Bid to determine if they complied with the mandatory requirements of the RFP, and where applicable, issued rectification notices to Suppliers to address deficiencies. P1 Consulting reviewed rectification notices, from a fairness perspective, and confirms that they were issued consistently and in accordance with the RFP. All ten (10) Suppliers met the mandatory requirements and proceeded to Stage 2 - Technical Proposal, Presentation and Rated Evaluations.

2.6 Stage 2 – Technical Proposal, Presentation and Rated Evaluations

The initial step of Stage 2 was the Supplier Presentation/Demonstrations. Suppliers were invited to deliver a presentation/demonstration of the Reporting System proposed as part of their response to the Part 4 - Section 3 - Subsection 7 - Reporting System. The Presentation/Demonstration was used by the Evaluation Committee as a mechanism to evaluate, score, confirm and finalize the score for each Supplier's technical proposal submission

As it relates to the Rated Evaluation, the members of the Evaluation Committee each undertook an individual evaluation and scoring of Bids against the criteria described in the nRFP. Subsequent to completion of the individual evaluations, a consensus evaluation process was used to evaluate the using the established evaluation criteria. The participants engaged in a fulsome exchange of views leading to evaluation results, which were agreed to by the evaluators for each Supplier. All participants performed their roles diligently throughout the evaluation process.

P1 Consulting attended all of the Supplier Presentation/Demonstrations and consensus meetings and observed that the proceedings were in accordance with the nRFP and the City's evaluation procedure documents. P1 confirms that the process was fair, transparent and unbiased.

The following Suppliers met or exceeded the minimum threshold identified in the nRFP for Stage 2 and proceeded to Stage 3 – Pricing and Initial Ranking:

- A.S.P. Incorporated
- Carraway Inc.
- Synergy Protection Group Inc.
- Ottawa Safety Council

2.7 Stage 3 – Pricing and Initial Ranking

The City reviewed the Part 5 - Pricing Forms submitted from each of the Suppliers who were eligible to participate in Stage 3. P1 Consulting reviewed and validated the results of Stage 3: Pricing and Initial Ranking and confirms that it was undertaken in a fair manner and in accordance with the nRFP.

As per the nRFP, for each Zone, the City invited the three (3) Suppliers with the lowest Total Proposed Cost for All Tiers, inclusive of any volume discounts offered, to participate in Stage 4: CCM and BAFO. The results of Stage 3 were as follows:

| | Zone 1 | Zone 2 | Zone 3 | Zone 4 |
|--------|--------------------------|-----------------------------|--------------------------|--------------------------|
| Rank 1 | Carraway Inc | Carraway Inc | Carraway Inc | Carraway Inc |
| Rank 2 | A.S.P. Incorporated | A.S.P. Incorporated | Ottawa Safety Council | A.S.P. Incorporated |
| Rank 3 | Ottawa Safety Council | Synergy Protection Group | ASP | Ottawa Safety Council |

2.8 Stage 4 – CCM and BAFO

In accordance with the nRFP and the results of Stage 3, the following Suppliers were invited to participate in Stage 4:

- A.S.P. Incorporated
- Carraway Inc.
- Synergy Protection Group Inc.
- Ottawa Safety Council

2.8.1 Stage 4A – Commercially Confidential Meetings

Short listed Suppliers were invited to collaborate with the City by way of Commercially Confidential Meetings, which is a collaborative process that allowed each short-listed Supplier to improve their Proposal in the areas open to resubmission through BAFO. In advance of participating in CCMs, the Evaluation Committee attended a training session on how to undertake the meetings in a fair and consistent manner. P1 Consulting facilitated the training session and attended the CCMs and confirms that they were conducted fairly and in accordance with the established parameters.

2.8.2 Stage 4B – Best and Final Offer

The Suppliers invited to Stage 4A submitted their BAFO after the CCM period by submitting their revised Proposal.

The City evaluated the revised Proposals for each of the Suppliers and, in accordance with the process described in the nRFP Part 1 - Section 3 - Award Process, selected the following Suppliers for each Zone:

| | Zone 1 | Zone 2 | Zone 3 | Zone 4 |
|--------|--------------|-------------------------------------|--------------|--------------------------|
| Rank 1 | Carraway Inc | Synergy Protection Group Inc. | Carraway Inc | Ottawa Safety Council |

2.10 Debriefing

At the time of this report, no debriefings have been conducted related to this procurement.

3. Conclusion

Our fairness review was conducted without influence and as of the date of this report, we confirm that we are satisfied that, from a fairness perspective, the processes undertaken related to the Provision of School Crossing Guards Services for the Various Locations within the City of Toronto nRFP have been conducted in a fair, open and transparent manner. As Fairness Monitor for this Project, we are satisfied that City have followed the procedures in accordance with the applicable nRFP and policy documentation and that the participants followed the procedures and fairly applied the evaluation criteria.

A handwritten signature in black ink that reads "Jill Newsome". The signature is written in a cursive, flowing style.

Jill Newsome
Fairness Monitor, P1 Consulting