

ALBERTA TRANSPORTATION
REQUEST FOR QUALIFICATIONS

FOR THE
DESIGN, BUILD, FINANCE, OPERATE
OF
SOUTHWEST CALGARY RING ROAD
BEING THE SOUTHWEST LEG OF THE RING ROAD FOR
THE CITY OF CALGARY, ALBERTA, CANADA



July 8, 2015

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Figure 1: Southwest Calgary Ring Road Regional Setting (location of Project within Calgary)

Figure 2: Southwest Calgary Ring Road Stage 1 (location of interchanges, flyovers and crossings)

Appendix "A" (Section 1.11 - Defined Terms)

Appendix "B" (Sections 3.2, 4.1, 4.2/5.2, 5.1, and 5.3 - Tables)

1 INTRODUCTION

1.1 Executive Summary of the Business Opportunity

Alberta Transportation (the “**Department**”) has received Alberta Government approval to proceed with procurement of the design, build, financing and operation (“**DBFO**”) of the Southwest Calgary Ring Road (the “**Project**”), being the southwest leg of the ring road in the City of Calgary, Alberta, Canada. The location of the Project in the context of the City of Calgary is shown on Figure 1. The Project is described in detail in Section 2 of this Request for Qualifications (“**RFQ**”).

In summary, the Project consists of an approximately 26 kilometre six- and eight-lane divided highway including, 13 interchanges (includes four systems interchanges), river bridge structures at the Elbow River, a creek bridge structure at Fish Creek, modifications to existing roadways and structures and additional pre-grading for future interchanges (see Figure 2). This Project will advance the completion of the Calgary Ring Road. The remaining West Calgary Ring Road will be the final segment to be completed, and is not part of the Project or this RFQ.

The Project will be procured as a DBFO. The RFQ phase of the procurement will be followed by a Request for Proposals (“**RFP**”), which will culminate in a DBFO Agreement. The procurement process and the DBFO Agreement will be based in large measure upon the successful processes and DBFO agreements realized in the Edmonton Southeast Anthony Henday Drive, Calgary Northeast Stoney Trail, Edmonton Northwest Anthony Henday Drive, Calgary Southeast Stoney Trail and Edmonton Northeast Anthony Henday Drive DBFOs that closed in January 2005, February 2007, July 2008, March 2010 and May 2012 respectively.

The DBFO Agreement for the Project will award to the successful bidder responsibility to design, construct and partially finance the Project, and to operate and maintain it for a term of 30 years following opening of the road. The Department will provide partial funding for the Project in an amount currently anticipated to be between 50% and 70% of the successful bidder’s capital cost of the Project. The successful bidder will supply private financing for the balance of the capital cost of the Project.

The Department intends that the RFP will be issued on or about September 18, 2015, that final bids in response to the RFP will be required on or about June 10, 2016, and that the DBFO Agreement will be entered into on or before September 7, 2016. (See Project Schedule in Section 2.4 below.)

1.2 Background

Alberta is an excellent place to work, live and do business.

The City of Edmonton and the City of Calgary are two of the five largest cities in Canada with metropolitan area populations exceeding one million each.

The Department is responsible for the operation of 27,000 kilometres of paved and 4,000 kilometres of gravel highway network in the Province, including 4,050 bridge structures. This highway network has a replacement value of about \$50 billion.

The Department is planning to expand its transportation network throughout the Province and to complete the ring roads around Edmonton and Calgary. The Project will be a vital transportation corridor for the movement of goods through Alberta and a key transportation link within the City of Calgary. The Project is a top priority for the Department.

1.3 Objectives of this RFQ

This RFQ is the first stage in the DBFO procurement process. The purpose of this RFQ is:

- a. to confirm sufficient interest among qualified private sector participants to proceed effectively with the DBFO procurement process; and
- b. to identify three teams (each, a “**Consortium**” and any two or more, “**Consortia**”) of private sector participants for participation in the RFP phase of the DBFO procurement process.

The objectives of the Department for the Project and the DBFO procurement process are:

- (i) to expeditiously complete the procurement process;
- (ii) to complete construction of the Project so that it is ready for traffic availability by October 1, 2021;
- (iii) to achieve value for money, that is, optimal value over the life of the Project, i.e. during the design-build phase and for a 30 year term thereafter (the “**Term**”);
- (iv) to ensure that the Project is designed, built and operated in an environmentally sound manner and in a manner that ensures the safety of the traveling public; and
- (v) to ensure that the highway infrastructure is handed back to the Department in suitable condition at the end of the Term.

Accordingly, the principal objective of this RFQ is to identify, from among Consortia responding to this RFQ (the “**Respondents**”), the three Respondents (“**Proponents**”) who the Department considers are most likely to further the above objectives for the Project. Specifically, by this RFQ process the Department hopes to identify the three Respondents who, in the Department’s assessment, are most likely to:

- (A) engage in the procurement process through to final bids;

- (B) submit highly competitive final bids that will achieve value for money for the DBFO; and
- (C) if selected as the successful bidder, design and build and operate the highway effectively and efficiently and in a manner that is financially and environmentally sound and that appropriately protects the safety of the traveling public.

The Department believes that assessment of Respondents' respective ability to satisfy the above criteria and meet the above objectives turns on four key questions:

1. Who are you? -- who are the key business entities ("**Team Members**") on your team, and who are the individuals ("**Key Individuals**") that will play a lead role on behalf of those Team Members? Section 4 of this RFQ addresses this key question.
2. What have you done? -- what pertinent experience, knowledge and skills do your Team Members and their Key Individuals have? Section 5 of this RFQ addresses this key question.
3. What is your plan? -- How do you plan to structure your Consortium and your approach to each of the project lead, the design-build, the operation and maintenance, and the financing of the Project? Section 6 of this RFQ addresses this key question.
4. What is your advantage? -- What are your significant advantages, whether of experience, organization, methodology or innovation, that suggest a relatively high probability that your Consortium will be able to deliver the winning bid and thereafter successfully carry out the Project through to the end of the Term? Section 7 of this RFQ addresses this key question.

1.4 Instructions to Interested Parties

All interested parties requesting an RFQ information package are required to register with the Department. To become "**Registered Parties**", interested parties will be required to pay a \$250 non-refundable fee. Only Registered Parties will be entitled to receive addenda to the RFQ issued by the Department.

Submissions by Respondents in response to this RFQ must:

- be in the format described in Section 3.3 of this RFQ;
- clearly identify the submission package as relating to "Southwest Calgary Ring Road, Request for Qualifications"; and
- be addressed to the attention of and physically delivered (fax or e-mail submissions will be rejected) to the address set out below no later than 4:00 p.m. Alberta Time on August 12, 2015:

Attention: Mr. Tom Loo
Executive Director, Strategic Partnerships Office
Location: Alberta Transportation

Suite 310, Twin Atria Building
4999 – 98 Avenue
Edmonton, Alberta, Canada
T6B 2X3

1.5 Addenda to this RFQ

The Department may make modifications to this RFQ, including but not limited to extending the RFQ closing time, by issuing addenda. It is the responsibility of the Respondent to ensure the Respondent's submission is in accordance with all addenda to the RFQ.

1.6 Communications

All correspondence and contact by Registered Parties or Respondents (including their Team Members and Key Individuals) with the Department in relation to this RFQ must be directly and only with the following individual (the "**Department Representative**") designated by the Department:

Mr. Tom Loo
Executive Director, Strategic Partnerships Office
Alberta Transportation
Suite 310, Twin Atria Building
4999 – 98 Avenue
Edmonton, Alberta, Canada
T6B 2X3

Email: tom.loo@gov.ab.ca
Phone: (780) 415-4876
Fax: (780) 415-0475

Registered Parties who wish to ask questions regarding this RFQ (other than in the course of the information meeting contemplated by Section 1.8, below) must submit them by a letter to the Department Representative (which may be by e-mail attachment in PDF form). The Department may decline to respond to questions received less than ten Business Days before the RFQ closing date indicated in Section 1.4 above. The Department may, where in its assessment confidentiality is not in issue and its response to a particular question is likely to be of interest to other Registered Parties, distribute to all Registered Parties copies of questions and the Department's responses.

1.7 No Lobbying

Interested parties, Registered Parties, Respondents and their Team Members and Key Individuals are strictly prohibited from engaging in any form of political or other lobbying whatsoever in relation to the Project or with a view to influencing the outcome of this RFQ process. Failure to comply with this provision may result in disqualification of your

Consortium from the RFQ process or, if the Department becomes aware of your breach of this provision after the RFP has been issued, from the RFP process.

1.8 Information Meeting

The Department intends to hold an information meeting with all interested parties as a group. The purpose of the information meeting will be to respond to questions and comments that interested parties may have regarding the RFQ and the Project. Attendance is optional. The information meeting is scheduled to be held as follows:

Date: July 15, 2015

Time: 10:30 a.m. to 12:00 p.m. Alberta Time

Location: Rosebud Room, McDougall Centre, 455 – 6 Street SW, Calgary, Alberta

Interested parties wishing to attend the information meeting must confirm their intention to:

Ms. Carla Armstrong
Executive Assistant, Major Capital Projects
Alberta Transportation
Suite 310, Twin Atria Building
4999 – 98 Avenue
Edmonton, Alberta, Canada
T6B 2X3
Email: carla.armstrong@gov.ab.ca
Phone: (780) 644-5612
Fax: (780) 415-0475

1.9 Available Information

All interested parties can access:

www.transportation.alberta.ca/sw-crrgp.htm

which site contains publicly available information about the Southwest Calgary Ring Road, and

www.transportation.alberta.ca/610.htm

which site includes the following electronic information:

- the RFP issued for the Northeast Anthony Henday Drive DBFO; and
- the versions of the DBFO Agreement that culminated the Northeast Stoney Trail RFP process, the Northwest Henday RFP process, the Southeast Stoney Trail RFP process and the Northeast Anthony Henday Drive RFP process dated September 26, 2006, July 29, 2008, March 30, 2010 and May 8, 2012 respectively, and

<ftp://www.tu.gov.ab.ca/Shared/MCPB>

User name: ftpmcpbuser

Password: Alberta1

which site includes the following electronic information:

- Southwest Calgary Ring Road (Highway 201), Functional Planning Study – Glenmore Trail / Stoney Trail Interchange to Highway 22X / Sarcee Trail Interchange – Final Report dated August 2008 prepared by Focus Corporation;
- West Calgary Ring Road, Functional Planning Study – Stoney Trail – 69 Street SW to Highway 1 (Trans-Canada Highway) Final Report dated June 2010 prepared by Focus Corporation;
- South Calgary Ring Road, Functional Planning Study – Macleod Trail SE to 85 Street SW dated August 2011 prepared by Focus Corporation; and
- Tables 3.2, 4.1, 4.2/5.2, 5.1, and 5.3 in electronic MS Word format.

The Department also maintains the following website that includes all of the Department's Guidelines, Standards and Specifications as well as current news and information: www.transportation.alberta.ca

1.10 No Liability

The Department does not, by issuing this RFQ or by any communication or documentation made or provided in connection with this RFQ, incur any duty of care or contractual obligation to any interested party, Registered Party, Respondent, Team Member, Key Individual or other person, and expressly disclaims any liability or obligation to any interested party, Registered Party, Respondent, Team Member, Key Individual or other person in connection with this RFQ. Statements in this RFQ of the Department's expectations in relation to the Project and the Project schedule, the RFQ process and the RFP process are relied upon or acted upon by interested parties, Registered Parties, Respondents, Team Members, Key Individuals and other persons solely at their own risk.

The Department may amend, suspend, postpone, cancel, or extend the closing of this RFQ or any future stage of the procurement of the Project without incurring liability to any interested party, Registered Party, Respondent, Team Member or Key Individual or other persons.

1.11 Defined Terms

Defined terms used in this RFQ are defined as they are introduced and capitalized throughout. For convenience, a summary of defined terms is attached as Appendix "A".

1.12 Fairness Auditor

The Department has retained a fairness auditor to oversee and report upon the RFQ process.

Respondents may seek a fairness opinion from the fairness auditor on matters relating to the RFQ process by sending to the Department Representative a package labelled with the Respondent's name and with "Request for Fairness Opinion", which package will include a letter of request for a fairness opinion addressed to the fairness auditor.

The Department intends that the fairness auditor will respond, by providing to the Department Representative the requested fairness opinion, to requests for fairness opinions on or before the fifth Business Day after receipt of the request by the Department Representative. The Department intends to issue fairness opinions and their corresponding requests to all Respondents. However, the Department reserves the right to issue particular fairness opinions only to a particular Respondent depending on whether the request is confidential, or not to issue a fairness opinion at all.

2 THE PROJECT

2.1 Description of Project

The Project will comprise:

- approximately 31 kilometres of a new six- and eight-lane divided freeway between Highway 8 and Macleod Trail; and
- the reconstruction of Glenmore Trail east of Sarcee Trail including the 37 Street interchange.

All of the above is to be constructed within the Government of Alberta-owned Transportation/Utility Corridor or highway right-of-way in the City of Calgary and the Municipal District of Foothills No. 31 and Rocky View County.

The Project will further comprise:

- interchanges at:
 - 69 Street Interchange;
 - Westhills Way Interchange;
 - Sarcee Trail Systems Interchange;
 - 37 Street/Glenmore Trail Interchange;
 - Strathcona Street Interchange;
 - 90 Avenue Interchange;
 - Anderson Road Systems Interchange;
 - 130 Avenue Interchange;
 - 146 Avenue/Fish Creek Boulevard Interchange;
 - 162 Avenue Interchange;
 - Highway 22X Systems Interchange;
 - James McKeivitt Road/Spruce Meadows Way Interchange;
 - 6 Street/Sherriff King Street Interchange; and

- Macleod Trail Systems Interchange;
- railway grade separation at Macleod Trail SE;
- grade separation at Weaselhead Road;
- pedestrian grade separation north of Anderson Road;
- river crossings at Elbow River; and
- creek crossing at Fish Creek.

The design life for all bridge structures is 75 years. All designs will have to meet the applicable national and provincial design codes and technical standards.

The operation and maintenance component of the DBFO will comprise:

- pavement surface maintenance (ride, skid resistance, etc.);
- pavement rehabilitation;
- bridge maintenance and rehabilitation;
- snow and ice removal;
- sign and landscape maintenance;
- drainage maintenance; and
- illumination and signal control.

The Department will provide partial funding for the Project in an amount currently anticipated to be between 50% and 70% of the successful bidder's capital cost of the Project. The successful bidder will supply private financing for the balance of the capital cost of the Project.

The vast majority of the right of way necessary for the Project has been purchased by the Department with the exception of some minor parcels which will be purchased by December 30, 2015. The highway will not be tolled.

2.2 Procurement Process

The first stage of the procurement process for the Project is this RFQ. The Department intends to invite three Respondents (but reserves the right to invite less or more than three Respondents) to participate as Proponents in the second stage of the procurement process, the RFP.

During the RFP stage, the Department intends to require Proponents to submit the following packages:

- Submission Requirement (“**SR**”) Package 1 –
 - Proponent information, including any changes to Consortium team membership (Refer to Section 4.1);
- SR 2 Package –
 - Proponent information, general management plan, detailed plans for design, construction, operations, maintenance, safety audit, whole-life management (preservation and rehabilitation), traffic management, quality management, environmental management, public communication, safety, project schedule, collaborating and insurance;
- SR2B Package –
 - Restated SR2 with all components clarified and indicative financing plan and indicative financial model; and

- SR 3 Package –
 - financial model, financing plan and financial offer.

The Department also intends to invite but not require Proponents to participate in an Optional Innovation Submission and feedback process. The Optional Innovation Submission would include non-binding information regarding innovative solutions being considered and identify departures from the solutions presented in the functional plan and the Technical Requirements provided by the Department. Proponents are not required to adopt in their SR Packages the innovative solutions proposed in their Optional Innovation Submissions.

An honorarium for RFP proposal development costs of \$1,500,000 (One Million, Five Hundred Thousand Canadian Dollars) will be paid to each of the unsuccessful Proponents who has submitted a compliant proposal to the RFP and agrees to transfer to the Department all intellectual property rights (including waiving of moral rights) contained within the Proponent's proposal. The successful Proponent will not be paid the honorarium.

2.3 DBFO Agreement

The draft DBFO Agreement will be issued concurrently with the RFP. It will be based in large measure upon the agreement utilized in the successful Northeast Anthony Henday Drive DBFO (see Section 1.9 above).

Proponents will be afforded at least two opportunities to provide written comments on the DBFO Agreement and thereafter engage in individual meetings with the Department's team. The DBFO Agreement will be finalized prior to the submission of final bids (see Project Schedule Section 2.4 below), and will not be negotiated further following selection of the Proponent submitting a compliant bid with the lowest net present value (the "**Preferred Proponent**").

2.4 Project Schedule

The Department intends (but see the disclaimer in Section 1.10, above) to adhere to the following schedule:

- | | |
|--|--------------------|
| • Issue RFQ | July 8, 2015 |
| • RFQ Information Meeting | July 15, 2015 |
| • RFQ Response Deadline | August 12, 2015 |
| • RFQ Respondent Presentations to Selection Committee (Section 8.4 meetings) | September 15, 2015 |
| • RFP Proponent Selection Announcement | September 16, 2015 |
| • Issue RFP | September 18, 2015 |
| • Proponents' Information Meeting | September 24, 2015 |

- SR 1 Submission Deadline October 19, 2015
- Utility/Municipalities/FAOC/Transport Canada/CPR Stakeholder Meeting October 26, 2015
- First Draft DBFO Agreement Comments Deadline October 28, 2015
- Engineering Meeting #1 November 2-4, 2015
- Notification of SR 1 Results November 2, 2015
- Innovation Submission Deadline November 13, 2015
- DBFO Agreement Meeting #1 November 18-20, 2015
- Notification of Innovation Results December 8, 2015
- Issue Second Draft of DBFO Agreement December 16, 2015
- Second Draft DBFO Agreement Comments Deadline January 26, 2016
- Engineering Meeting #2 December 16-18, 2015
- SR 2 Submission Deadline February 3, 2016
- DBFO Agreement Meeting #2 February 10-12, 2016
- Issue Penultimate DBFO Agreement March 4, 2016
- Penultimate Draft DBFO Agreement Comments Deadline March 11, 2016
- Issue Final Form of DBFO Agreement April 4, 2016
- Notification of SR 2 Results April 25, 2016
- SR 2B Submission Deadline May 10, 2016
- Notification of SR 2B Results May 31, 2016
- Notification of Discount and Inflation Rates June 8, 2016
- SR 3 Submission Deadline June 10, 2016

- Notification of Preferred Proponent July 4, 2016
- DBFO Agreement Signing Deadline September 7, 2016
- Traffic Availability Target Date October 1, 2021

3 RFQ REQUIREMENTS

3.1 Ineligibility

Respondents must not include among their Team Members or Key Individuals any business entity or individual who is, is associated with or is in any way likely to create a conflict of interest or a perception of conflict of interest with any of the following:

- any consultant retained by the Department in relation to the Project, including but not limited to consultants providing engineering, process, finance or financial capacity advice, namely:
 - Engineering Consultants
 - CH2M Hill Canada Limited;
 - ISL Engineering and Land Services Ltd.;
 - Thurber Engineering Ltd.;

- D.E.S. Engineering Limited.;
- CH2M Hill Energy Canada, Ltd.;
- JHoad Consulting;
- Wim M. Veldman, M.Sc., FEIC, P. Eng.; and
- Canadian Highways Institute Ltd.
- Financial and Process Consultant
 - Deloitte LLP;
- the fairness auditor for the Project, Gary G. Campbell, Q.C. and GGC Consultants Inc.;
- any former or current employee of the Province who through his/her employment by the Province has had direct involvement with the Project or projects similar to the Project; or
- any member of the Legislative Assembly of Alberta, or any associated person (as set out in the *Conflicts of Interest Act (Alberta)*).

If a Respondent considers that a particular relationship or association does not create a conflict of interest and will not create a perception of conflict of interest, but is concerned that the Department could arrive at a different conclusion, the Respondent should fully disclose the circumstances to the Department at the earliest possible date, and request that the Department provide an advance interpretation as to whether the relationship or association will be likely to create a conflict of interest or a perception of conflict of interest.

Failure to comply with this provision may result in disqualification of your Consortium from the RFQ process or, if the Department becomes aware of your breach of this provision after the RFP has been issued, from the RFP process.

3.2 Team Name and Lead Contact

A Respondent's submission must at the outset state a team name and an organization (the "**Contact Organization**") that will be the contact for all communications with the Department regarding this RFQ, and an individual (the "**Contact Individual**") responsible for all such communications on behalf of that organization. The Department shall be entitled to rely on any communication from the Contact Individual as having been duly authorized by the Contact Organization and as being duly given on behalf of the Respondent and its Team Members.

The following information must be provided for the Contact Individual:

- name;
- company name;
- title;
- address;
- phone number;
- fax number; and
- e-mail address.

Table 3.2 in the attached Appendix "B" must be completed and provided as part of the Respondent's submission.

A Respondent may change its Contact Organization only by providing to the Department a written notice from the previous Contact Organization. The Contact Organization may substitute a new Contact Individual only by a written notice to the Department signed either by the previous Contact Individual or by an officer of the Contact Organization whose authority to do so is affirmed to the satisfaction of the Department.

3.3 Format of Submission

Your submission must:

- be entirely in the English language;
- consist of the information required by Section 3.2 and Sections 4, 5, 6 and 7 of this RFQ;
- include one original hard copy and 12 additional hard copies (including one copy in unbound form and otherwise suitable for copying), and one electronic copy. Notwithstanding the foregoing, for the financial statements, annual reports, bank references and alternative information indicated in Section 4.1, all that is required is one original hard copy; and
- in furtherance of confidentiality, include in a **SEPARATE SEALED ENVELOPE MARKED “CONFIDENTIAL FINANCIAL INFORMATION”** all financial statements, annual reports, bank references and alternative information indicated in Section 4.1 that are part of the submission.

3.4 Confidentiality of Submissions and the Collection of Personal Information

All records submitted in response to this RFQ may be subject to disclosure under the *Freedom of Information and Protection of Privacy Act (Alberta)* (“**FOIP**”). Except as otherwise expressly indicated by Respondents, submissions in response to this RFQ will be considered to have been submitted in confidence and will not be disclosed by the Department or its consultants except as required by FOIP or any other law.

The Respondent must advise, and must ensure Team Members advise, Key Individuals that all personal information (as defined in FOIP) provided to the Department in conjunction with the RFQ process is being collected for the purpose of evaluating the Respondent’s RFQ submission, pursuant to the *Government Organization Act (Alberta)* and the terms of this RFQ. The Key Individuals must also be advised that should they have any questions regarding this collection they may contact the Department Representative. It is the Respondent’s responsibility to obtain Key Individuals’ authorization to include such personal information in the RFQ submission and authorization for the Department to do reference checks. Respondents must, if so requested by the Department, supply evidence demonstrating that such authorizations have been properly obtained in accordance with this section.

Notwithstanding the foregoing, the Department may release the identity of the Respondents, their Team Members and Key Individuals in relation to the Project, as the Department determines to be necessary.

3.5 Publicity

No press release shall be issued by any interested parties or Respondents or their Team Members or Key Individuals in relation to the Project without first obtaining the prior written consent of the Department. Breach of this provision may result in disqualification of your Consortium from the RFQ process or, if the Department becomes aware of your breach of this provision after the RFP has been issued, from the RFP process.

3.6 No Collusion or Common Ownership

Respondents must ensure that their participation in this RFQ is conducted without collusion or fraud on their part or any of their Team Members or Key Individuals. Respondents and their Team Members and Key Individuals shall not engage in discussions or other communications with any other Respondents or their Team Members and Key Individuals regarding the preparation or submission of their responses to this RFQ. Breach of this provision may result in disqualification of your Consortium from the RFQ process or, if the Department becomes aware of your breach of this provision after the RFP has been issued, from the RFP process.

Common ownership between Team Members on different Respondents (“**Common Ownership**”) that may reduce, or be perceived to reduce, the competition between the applicable RFP proposals (“**Competition Reduction**”) should such Respondents be short-listed may result in removal of the Respondent from the RFQ process. If a Respondent considers that a particular Common Ownership should not be determined to be Competition Reduction, but is concerned that the Department could arrive at a different conclusion, the Respondent should fully disclose the circumstances to the Department at the earliest possible date, and request that the Department provide an advance interpretation as to whether the particular Common Ownership would be determined to be Competition Reduction. If the Department determines a particular Common Ownership to be Competition Reduction, then the Department may remove all but one of the Respondents involved in the Common Ownership (the “**Commonly-Owned Respondents**”) from the RFQ process or, if the determination occurs after the RFP has been issued, from the RFP process.

The Department may determine the Respondent involved in the Common Ownership that is not removed based upon the Respondent involved in the Common Ownership with the highest evaluation score pursuant to Section 8 (RFQ Evaluation). If there is a tie among the highest evaluation scores among two or more Commonly-Owned Respondents, the Department may determine the Respondent involved in the Common Ownership that is not removed based upon a random draw among the Commonly-Owned Respondents with the tied highest evaluation scores.

Whether the Department determines that there is Competition Reduction is fact specific and depends upon a number of factors, including without limitation some of the following:

- the nature of the role the commonly-owned Team Members play with their respective Respondent, including without limitation whether the commonly-owned Team Members are Lead Team Members with their respective Respondent;

- the size of the role the commonly-owned Team Members play in terms of the Project or the O&M;
- the anticipated public perception should the non-commonly-owned Proponent drop out of the RFP process for whatever reason leaving only the two Commonly-Owned Respondents. In such case, would the nature and degree of Common Ownership be such that the public may perceive competition to be lessened;
- whether the nature of the Common Ownership is indirect such as a Team Member's pension plan holds units in a fund and that fund holds shares in a Team Member with another Respondent;
- given similar facts, what other jurisdictions in Canada and around the world have done, and whether other jurisdictions have allowed the Commonly-Owned Respondents to be proponents under a request for proposals;
- whether the Commonly-Owned Respondents be considered related, associated, or at non-arm's length under the *Income Tax Act* (Canada) and case law;
- any measures the Commonly-Owned Respondents propose to implement to give the Department comfort that there are no communications (express or implied) between the commonly-owned Team Members in respect of the RFQ process or the RFP process;
- the number of Respondents; and
- whether the commonly-owned Team Members provide specialized services which can only commercially reasonably be provided by a very limited number of entities.

3.7 Non-Conforming Submissions

If a Respondent's submission does not strictly conform with any provision of this RFQ ("**Non-Conformance**"), the Department may, at its option:

- if in the Department's opinion the Non-Conformance is immaterial, waive the Non-Conformance;
- if the Non-Conformance is an omission, the Department may give the Respondent up to five Business Days to supply the omitted material; or
- if in the Department's opinion the Non-Conformance is material, reject the submission as non-compliant.

3.8 Expenses

No honorarium or compensation will be offered by the Department to any Respondent, Team Member or Key Individual in consideration of expenses incurred in responding to this RFQ.

4 YOUR TEAM

4.1 Team Members

Tell us about the Team Members who constitute your Consortium, including at least completion of Table 4.1A in the attached Appendix “B”. As indicated by that Table, Team Members must be separately listed for:

- your “Project Lead” (as defined in Section 6.4 below);
- your design-construction team;
- your operation and maintenance team;
- your financing team.

Tables 4.1B to 4.1E in the attached Appendix “B” must be fully completed and included as part of your submission.

A particular Team Member may be part of more than one of those teams, and thus be listed in more than one of those Tables.

Providing organizational charts as part of the response to this RFQ is strongly encouraged. You must indicate a lead (the “**Lead Team Member**”) for each of your design-construction team, your operation & maintenance team, and your financing team. For **each** Lead Team Member, as well as for any Team Member who is or is part of the “Project Lead” but is not otherwise a Lead Team Member, you must include as part of your submission:

- audited financial statements and annual reports for each of the last three years;
- interim financial statements for each quarter since the most recent year for which audited statements are provided;
- details of any material off balance sheet financial arrangements currently in place;
- bank references (or alternatively, in the case of the Lead Team Member of your financing team, such alternative information as in your estimation will fully satisfy the Department of the financial capability of such Lead Team Member to lead and carry out your Consortium’s plan for financing the Project). Bank references should be letters from the bank setting out at least the: length of banking relationship; types and amounts of credit facilities; and credit history with the bank;
- credit rating information, if available; and
- details of any material events that may affect the entity’s financial standing since the last annual or interim financial statement provided.

No Team Member is to be listed as part of your Consortium unless they have formally consented in writing to be so listed in your submission (which written consent must be produced if requested by the Department).

Where prospective Team Members are under consideration but have not formally committed to being part of your Consortium, they are not to be mentioned in your submission unless:

- your submission expressly indicates that the prospective Team Member is under consideration but has not formally been accepted by your Consortium and/or have not formally committed to being part of your Consortium; and

- the prospective Team Member has consented in writing to being so mentioned in your submission (which written consent must be produced if requested by the Department).

A prospective Team Member will not be considered in the evaluation of the Respondent by the Department until such time as the prospective Team Member has consented in writing to its change in status from a prospective Team Member to an actual Team Member (which written consent must be produced if requested by the Department) and provided all submission requirements in this RFQ have been satisfied in respect of that prospective Team Member, and the Department has been so notified in writing of the change in status. Listing a prospective Team Member in a submission and providing all submission requirements in respect of that prospective Team Member does expedite the Department's consideration of a change in status from a prospective Team Member to an actual Team Member if and when such proposed change in status occurs.

4.2 Key Individuals

Tell us about the Key Individuals who will be the lead for each Team Member, including at least completion of Tables 4.2/5.2A, 4.2/5.2B, 4.2/5.2C, and 4.2/5.2D in the attached Appendix "B". As indicated by those Tables, Key Individuals must be separately listed for:

- your "Project Lead" (as defined in Section 6.4 below);
- your design-construction team;
- your operation and maintenance team; and
- your financing team.

Providing resumes for Key Individuals as part of the response to this RFQ is strongly encouraged. A particular Key Individual may be part of more than one of those teams, and thus be listed in more than one of those Tables.

For each Key Individual, indicate your best estimate of the probability that the Key Individual will be available as needed throughout the Project. Where appropriate, identify a proposed back-up or replacement for any Key Individual, and include the same information as if that back-up or replacement were a Key Individual.

4.3 Substitutions

If, following submission of your response to this RFQ, you become aware that any of your Team Members or Key Individuals will be unable or is likely to be unable to participate in your Consortium, you must immediately so advise the Department, and indicate your proposed substitute Team Member or Key Individual. Failure to do so may result in disqualification of your Consortium from the RFQ process or, if the Department becomes aware of your breach of this provision after the RFP has been issued, from the RFP process.

Upon receipt of notification of a requested substitution of a Team Member or Key Individual, it is at the sole discretion of the Department to allow such a substitution. In making a determination regarding the acceptability of a proposed substitution, the

Department, without limiting the generality of its considerations, will consider whether or not a proposed substitution:

- Provides an unfair advantage to the Respondent; or
- Jeopardizes or delays the RFQ evaluation process.

All information required by this RFQ in respect of Team Members or Key Individuals must be provided to the Department in respect of any proposed substitute Team Members or Key Individuals, as applicable.

5 YOUR EXPERIENCE

5.1 Team Members' Experience

Tell us about the experience of each Team Member that is pertinent to the Project, including at least completion of Tables 5.1A, 5.1B, 5.1C, and 5.1D in the attached Appendix "B". As indicated by those Tables, the experience of Team Members must be separately listed for:

- your "Project Lead" (as defined in Section 6.4 below);
- your design-construction team;
- your operation and maintenance team; and
- your financing team.

Where a Team Member is part of more than one of those teams, the pertinent experience of that Team Member must be listed in each applicable Table.

5.2 Key Individuals' Experience

Tell us about the experience of each Key Individual that is pertinent to the Project, including at least completion of Tables 4.2/5.2A, 4.2/5.2B, 4.2/5.2C, and 4.2/5.2D in the attached Appendix "B". As indicated by those Tables, the experience of Key Individuals must be separately listed for:

- your "Project Lead" (as defined in Section 6.4 below);
- your design-construction team;
- your operation and maintenance team; and
- your financing team.

Where a Key Individual is part of more than one of those teams, the pertinent experience of that Key Individual must be listed in each applicable Table.

5.3 Collective Experience

Indicate past experience of Team Members or Key Individuals participating together in a DBFO or similar projects, including results achieved, lessons learned, relationships forged and synergies produced that are anticipated to be advantageous in relation to the Project. The providing of a summary of such past experience through the completion of Table 5.3 as part of the response to this RFQ is strongly encouraged.

6 YOUR PLAN

6.1 Design-Construction Plan

Describe your plan for the design and construction of the Project, having specific regard to:

- any pertinent information regarding the intended organization, management and coordination of the design-construction team;

- design management, roadway design, bridge design, drainage design, and utilities design;
- construction management, grading, surfacing, utilities and underground work, and bridge construction;
- quality management, quality control and quality assurance;
- safety;
- environmental management;
- regulatory permitting of river/creek crossings and realignments;
- whole-life management;
- any specifically intended innovative approaches to design or construction; and
- how your team proposes to deliver cost certainty.

Recognizing Respondents do not know the details of the Project and for information purposes only, Respondents views, as part of the Response, are sought on whether approximately 65% of the Project could be completed, but not opened to traffic, in 2020 rather than in 2021 and how that could be accomplished.

6.2 Operation & Maintenance Plan

Describe your plan for the operation & maintenance of the Project following completion of the design-construction phase, having specific regard to:

- any pertinent information regarding the intended organization, management and coordination of the operation & maintenance team;
- operations and routine maintenance, bridge whole-life management, roadway and corridor whole-life management, and traffic management;
- public safety;
- major rehabilitation;
- quality control;
- environmental management;
- any specifically intended innovative approaches to operation & maintenance; and
- how your team intends to deliver cost certainty over the term of the DBFO.

6.3 Financing Plan

Describe your plan for financing of the Project, having specific regard to:

- any pertinent information regarding the management, organization and coordination of the financing team;
- delivery of the “Financing and Initial Performance Letter of Credit” (see the Northeast Anthony Henday DBFO Agreement) that will be required to be lodged upon signing of the DBFO Agreement;
- equity financing (including anticipated sources);
- debt financing (including anticipated sources, if possible);
- any specifically contemplated innovative approaches to financing of the Project;
- any specifically contemplated alternatives to your financing plan; and
- any ramifications to your financing plan of the Government of Alberta providing cash funding between 50% and 70% of the capital cost of the Project.

6.4 Consortium Management Plan

Describe your plan for governing your Consortium through the RFP stage and during the design-construction phase of the Project and beyond, having specific regard to:

- which Team Member or combination of Team Members, and which Key Individual or Key Individuals (collectively, the “**Project Lead**”) will be the directing mind and will of your Consortium;
- decision-making on behalf of the Consortium, both during the RFP stage and beyond;
- contractual relationships among Team Members;
- risk allocations among Team Members;
- communications with media, the public, The City of Calgary, Tsuu T’ina Nation, the Municipal District of Foothills No. 31, Rocky View County and other stakeholders; and
- any other pertinent information regarding the organization, management and coordination of the Consortium.

7 YOUR ADVANTAGE

7.1 Summary Description of Your Advantage

Having regard to your responses to Sections 4, 5, and 6, under the heading “Why We Should Be Selected to Participate in the RFP Process”, summarize in no more than five pages why the organization, plan, and experience of your Consortium gives you an advantage over other Respondents. In other words, why is your Consortium, if selected to participate in the RFP, more likely than other Respondents to:

- a. engage in the procurement process through to final bids;
- b. submit a highly competitive final bid that would achieve value for money for the DBFO; and
- c. if selected as the successful bidder, design and build and operate the highway effectively and efficiently and in a manner that is financially and environmentally sound and that appropriately protects the safety of the traveling public.

8 RFQ EVALUATION

8.1 Scoring Matrix

The Department intends to evaluate Respondents in accordance with the following scoring matrix:

Evaluation Category	Weighting (%)
Project Lead <ul style="list-style-type: none"> • Organization and Plan • Team Members' Experience • Key Individuals' Experience 	25 10 10 5
Design - Construction Team <ul style="list-style-type: none"> • Organization and Plan • Team Members' Experience • Design Key Individuals' Experience • Construction Key Individuals' Experience 	30 10 10 5 5
Operation and Maintenance (O&M) Team <ul style="list-style-type: none"> • Organization and Plan • Team Members' Experience • Key Individuals' Experience 	20 10 5 5
Financing Team <ul style="list-style-type: none"> • Organization and Plan • Team Members' Experience • Key Individuals' Experience 	25 10 10 5
Total	100

8.2 Pass/Fail Threshold

In addition to the scoring matrix in Section 8.1, Respondents will be evaluated on a pass-fail basis based on the Department's assessment of:

- financial capacity to successfully design and construct the Project; and
- capability of arranging financing required for the Project;

in each case having regard to the magnitude of the Project.

8.3 Basis of Evaluation

Respondents will be evaluated primarily on the basis of their RFQ submissions, including any additional clarifications or information supplied pursuant to requests from the Department under Section 8.4, below. In addition, the Department may have regard

to information received from any source that the Department considers reliable, including but not limited to:

- research to validate information supplied by Respondents;
- information and opinions supplied by the Department's consultants; and
- banking and reference checks (to which banking and reference checks Respondents and their Team Members and to which reference checks Key Individuals, shall be deemed to have consented by the Respondent's submission in response to this RFQ).

8.4 Clarifications and Interviews

If requested by the Department to provide clarification or additional information in relation to a submission in response to this RFQ, a Respondent must provide such clarification or additional information within the time specified by the Department.

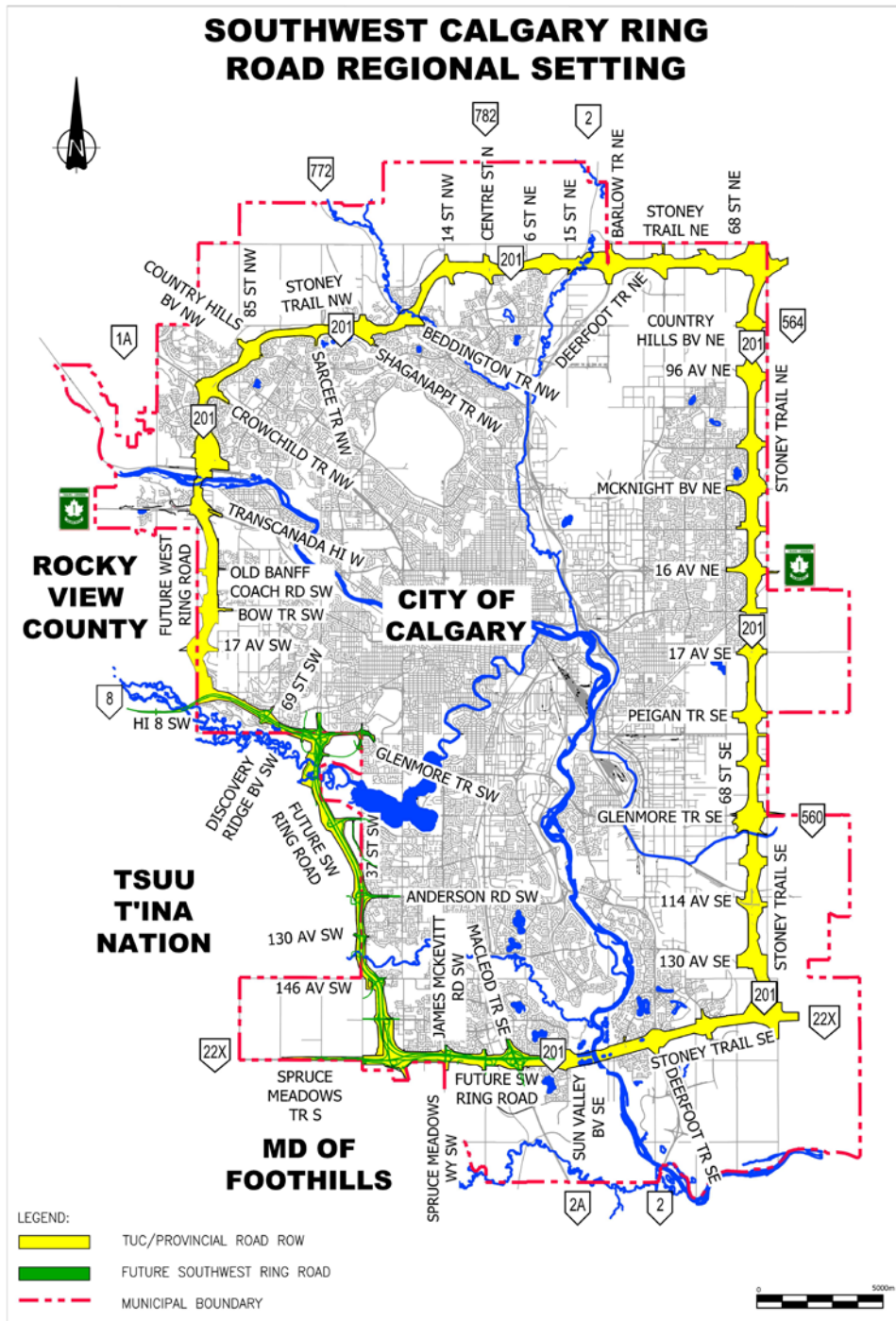
If requested by the Department, a Respondent must, within the time specified by the Department, meet with representatives of the Department to provide explanation or clarification of its submission in response to this RFQ.

8.5 Debriefing

Following completion of the evaluation process and announcement of the Respondents short-listed as Proponents for participation in the RFP, the Department will upon request conduct an individual debriefing session with any unsuccessful Respondent.

During such debriefing, the evaluation, scoring, ranking and content of any responses will not be disclosed. Only the strengths and weaknesses of the Respondent's response relative to the evaluation criteria will be disclosed and discussed.

Figure 1



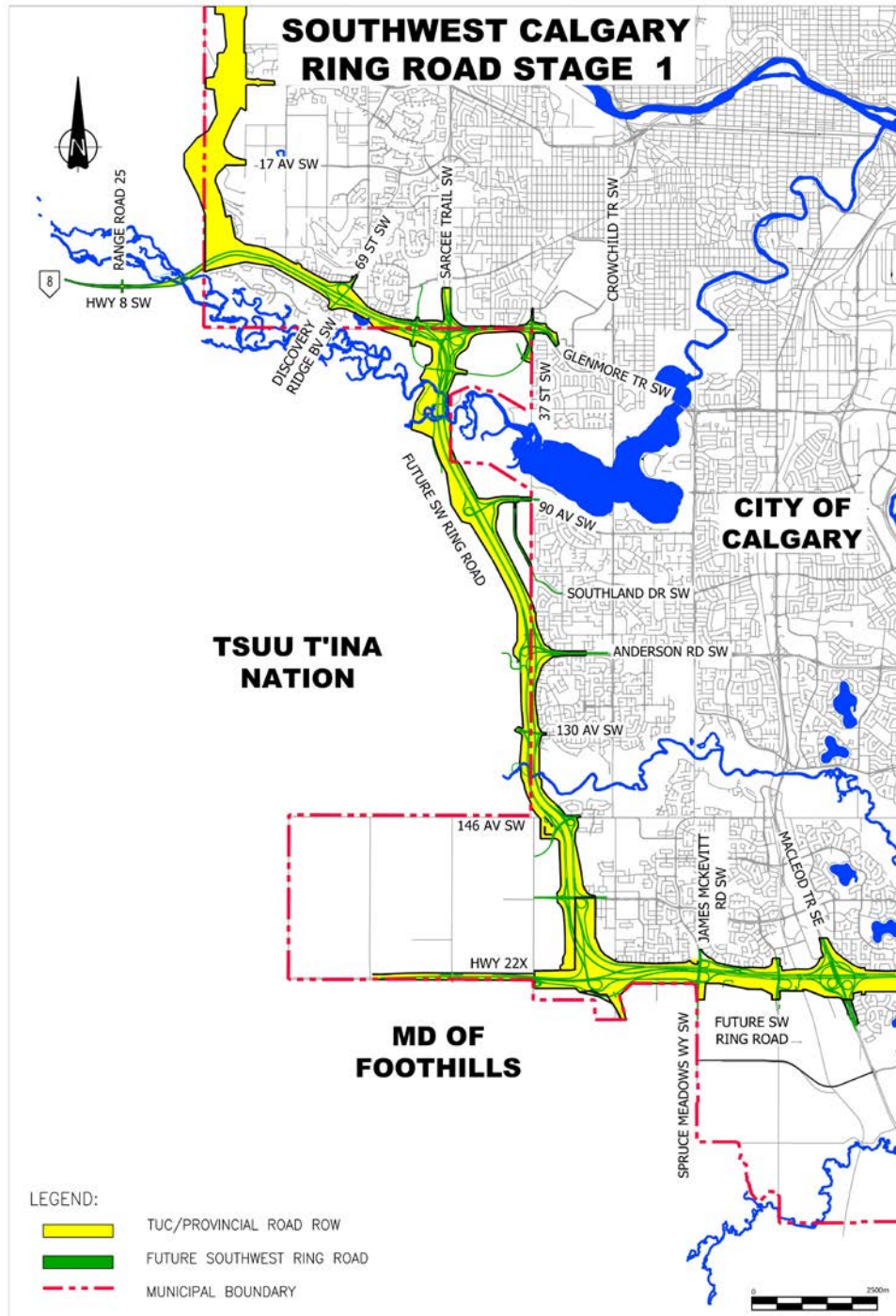


Figure 2

APPENDIX “A”
(Section 1.11 – Defined Terms)

“**Alberta Time**” means the time in the Province of Alberta in accordance with the *Daylight Saving Time Act* (Alberta);

“**Business Day**” means a day other than a Saturday, Sunday or statutory holiday in Alberta;

“**Consortium**” means a team of private sector participants, and “**Consortia**” means, collectively, two or more teams of private sector participants;

“**Contact Individual**” has the meaning as set out in Section 3.2;

“**Contact Organization**” has the meaning as set out in Section 3.2;

“**CPR**” means Canadian Pacific Railway Company;

“**DBFO**” means design, build, financing and operation;

“**Department**” means Her Majesty the Queen in right of Alberta, as represented by the Minister of Transportation;

“**Department Representative**” means the individual on behalf of the Department set out in Section 1.6;

“**FAOC**” means Fisheries and Oceans Canada;

“**FOIP**” means *Freedom of Information and Protection of Privacy Act* (Alberta);

“**Key Individuals**” mean the individuals that will play a lead role on behalf of a particular Team Member;

“**Lead Team Member**” has the meaning as set out in Section 4.1;

“**Preferred Proponent**” means the Proponent submitting a compliant bid to the RFP whose bid is a payment stream having the lowest net present value over the Term;

“**Project**” means the Southwest Calgary Ring Road as described in Section 2.1;

“**Project Lead**” has the meaning as set out in Section 6.4;

“**Proponents**” means the Respondents short-listed to participate in the RFP;

“**Registered Parties**” means interested parties registered with the Department pursuant to Section 1.4;

“**Respondents**” mean Consortia responding to the RFQ;

“**RFP**” means Request for Proposals;

“**RFQ**” means this Request for Qualifications;

“**SR**” means submission requirement;

“**Team Members**” means the key business entities forming a particular Respondent;

“**Term**” means the design-construction phase and the 30 year term thereafter; and

“**Traffic Availability Target Date**” means October 1, 2021.

B-1
APPENDIX “B”

Table 3.2 - Contact Organization and Contact Individual

Name of Respondent	
Contact Organization Mailing Address	Address: City: Province/State: Country: Postal Code:
Contact Organization Telephone Number	
Contact Organization Fax Number	
Contact Organization E-mail Address	
Contact Organization Website Address	
Name of Contact Individual	
Title	
Company	
Mailing Address	Address: City: Province/State: Country: Postal Code:
Telephone Number	
Fax Number	
E-mail Address	

Table 4.1A - Team Members

Team Member Category	Team Member (Company/Firm Name)	Indicate if Lead Team Member	Primary Role and Responsibility	Key Individuals with the Team Member (Name, title and brief description of primary role and responsibility) <small>[NOTE: each Key Individual listed below must also be correspondingly listed in Tables 4.2/5.2A through 4.2/5.2D in which more detail may be provided]</small>
Project Lead				
•				
•				
Design-Construction				
•				
•				
O&M				
•				
•				
Financing				
•				
•				

Table 4.1B – Project Lead Team Member Name, Role and Legal Status

(NOTE: repeat this table for each Team Member that constitutes the Project Lead)

Name	
Mailing Address	Address: City: Province/State: Country: Postal Code:
Telephone Number	
E-mail Address	
Website Address	
Key Individual that is the contact person for the Team Member	
Mailing Address	Address: City: Province/State: Country: Postal Code:
Telephone Number	
E-mail Address	
Role and Responsibility of Team Member in Project Lead	

Type of Entity (corporation, partnership, joint venture, etc.)	
Legal Name	
Jurisdiction of Incorporation / Registration	
Registered Address	
Current Trading/Business Name	
Provide a description setting out (or diagram showing) the legal/beneficial ownership chain of the Team Member from the direct owner(s) of the Team Member all the way up to the ultimate owner(s). If a particular level of the ownership chain has diffuse ownership among numerous persons, that level can be summarized in the description/diagram.	

Table 4.1C – Design-Construction Team Member Name, Role and Legal Status

(NOTE: repeat this table for each Team Member in the Design-Construction team)

Name	
Mailing Address	Address: City: Province/State: Country: Postal Code:
Telephone Number	
E-mail Address	
Website Address	
Key Individual that is the contact person for the Team Member	
Mailing Address	Address: City: Province/State: Country: Postal Code:
Telephone Number	
E-mail Address	
Role and Responsibility of Team Member in Design-Construction Team	

Type of Entity (corporation, partnership, joint venture, etc.)	
Legal Name	
Jurisdiction of Incorporation / Registration	
Registered Address	
Current Trading/Business Name	
Provide a description setting out (or diagram showing) the legal/beneficial ownership chain of the Team Member from the direct owner(s) of the Team Member all the way up to the ultimate owner(s). If a particular level of the ownership chain has diffuse ownership among numerous persons, that level can be summarized in the description/diagram.	

Table 4.1D – O&M Team Name, Role and Legal Status

(NOTE: repeat this table for each Team Member in the O&M team)

Name	
Mailing Address	Address: City: Province/State: Country: Postal Code:
Telephone Number	
E-mail Address	
Website Address	
Key Individual that is the contact person for the Team Member	
Mailing Address	Address: City: Province/State: Country: Postal Code:
Telephone Number	
E-mail Address	
Role and Responsibility of Team Member in O&M Team	

Type of Entity (corporation, partnership, joint venture, etc.)	
Legal Name	
Jurisdiction of Incorporation / Registration	
Registration No.	
Current Trading/Business Name	
Provide a description setting out (or diagram showing) the legal/beneficial ownership chain of the Team Member from the direct owner(s) of the Team Member all the way up to the ultimate owner(s). If a particular level of the ownership chain has diffuse ownership among numerous persons, that level can be summarized in the description/diagram.	

Table 4.1E – Financing Team Member Name, Role and Legal Status

(NOTE: repeat this table for each Team Member in the Financing team)

Name		
Mailing Address	Address: City: Province/State: Country: Postal Code:	
Telephone Number		
E-mail Address		
Website Address		
Key Individual that is the contact person for the Team Member		
Mailing Address	Address: City: Province/State: Country: Postal Code:	
Telephone Number		
E-mail Address		
Role and Responsibility of Team Member in Financing Team		

Type of Entity (corporation, partnership, joint venture, etc.)	
Legal Name	
Jurisdiction of Incorporation / Registration	
Registered Address	
Current Trading/Business Name	
Provide a description setting out (or diagram showing) the legal/beneficial ownership chain of the Team Member from the direct owner(s) of the Team Member all the way up to the ultimate owner(s). If a particular level of the ownership chain has diffuse ownership among numerous persons, that level can be summarized in the description/diagram.	

Table 5.1A – Project Lead Team Member DBFO Experience

(NOTE: repeat this table for each Team Member that constitutes the Project Lead identified in Table 4.1A)

Project Lead Team Member: _____

Past DBFO Project Name/Description/Stage of Procurement	Client Reference (Client Name, Contact name, Phone number, E-mail)	Project Lead Team Member Role on Past DBFO Project	Past DBFO Project Capital Value and Overall Net Present Value with Associated Discount Rate OR Past DBFO Project Capital Value and Total Project Value and Term of Project in Years	Date of Financial Close and Construction Completion for Past DBFO Project	Key Individuals named in Table 4.2/5.2A who (if any) were involved in the listed Past DBFO Project
DBFO Projects within past two years:					
Other DBFO projects:					

Table 5.1B – Design-Construction Team Member Experience

(NOTE: repeat this table for each Team Member in the Design-Construction team identified in Table 4.1A)

Design-Construction Team Member:

Past Project Name/Description/Stage of Procurement	Client Reference (Client Name, Contact name, Phone number, E-mail)	Design-Construction Team Member Role on Past Project	Past Project Capital Value and Overall Net Present Value with Associated Discount Rate OR Past Project Capital Value and Total Project Value with Term of Project in Years	Names of Design-Construction Lead Team Members on Past Project	Key Individuals named in Table 4.2/5.2B who (if any) were involved in the listed Past Projects
Projects within past two years:					
Other projects:					

Table 5.1C – O&M Team Member Experience

(NOTE: repeat this table for each Team Member in the O&M team identified in Table 4.1A)

O&M Team Member: _____

Past Project Name / Description / Stage of Procurement	Client Reference (Client Name, Contact name, Phone number, E-mail)	O&M Team Member Role on Past Project	Past Project Capital Value and Overall Net Present Value with Associated Discount Rate OR Past Project Capital Value and Total Project Value with Term of Project in Years	Names of O&M Lead Team Members on Past Project	Key Individuals named in Table 4.2/5.2C who (if any) were involved in the listed Past Project
Projects within past two years:					
Other projects:					

Table 5.1D–Financing Team Member Experience

(NOTE: repeat this table for each Team Member in the Financing team identified in Table 4.1A)

Financing Team Member: _____

Past Project Name and Description/Stage of Procurement	Client Reference (Client Name, Contact name, Phone number, E-mail)	Type and Amount of Financing Raised (include capital structure, any innovations or variations from the normal financing)	Date of Financial Close	Role of Team Member on Past Project	Names of Financing Lead Team Members on Past Project	Key Individuals named in Table 4.2/5.2C who (if any) were involved in the listed Past Project
Projects within past two years:						
Other projects:						

Table 5.3 – Collective Experience

Project Name/Description /Stage of Procurement	Team Member 1 (NOTE: Team Members listed below must also be listed in Table 4.1A)	Team Member 2 (NOTE: Team Members listed below must also be listed in Table 4.1A)	Etc.	Key Individual 1 (NOTE: Key Individuals listed below must also be listed in Table 4.1A)	Key Individual 2 (NOTE: Key Individuals listed below must also be listed in Table 4.1A)	Etc.	
Project A	•	•		•			Bullet indicates Team Member/Key Individual worked on Project
Project B		•	•		•		Bullet indicates Team Member/Key Individual worked on Project
Project C	•	•	•				Bullet indicates Team Member/Key Individual worked on Project
Etc.							Bullet indicates Team Member/Key Individual worked on Project