



PREPARING RFPs:
A Ministry Guide to the
Request for Proposals (RFP) Process

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CONTENTS

1	INTRODUCTION	4
2	THE REQUEST FOR PROPOSALS (RFP) PROCESS	7
3	PREPARING THE REQUEST FOR PROPOSALS (RFP) DOCUMENT	8
3.1	RFP Template	8
3.2	Customized RFPs.....	8
3.3	Small Projects	9
3.4	Complex Projects	9
4	USING THE REQUEST FOR PROPOSALS TEMPLATE	10
4.1	RFP Cover Section	11
4.2	RFP Section 1: Summary of the Requirement.....	14
4.3	RFP Section 2: RFP Process Rules.....	14
4.4	RFP Section 3: Situation / Overview	16
4.5	RFP Section 4: Contract.....	19
4.6	RFP Section 5: Requirements	20
4.6.1	RFP Section 5.1 Capabilities	21
4.6.2	Response Guidelines	30
4.6.3	RFP Section 5.2 Approach	32
4.6.4	RFP Section 5.3 Price	33
4.6.5	Assistance with Writing Section 5	34
4.7	RFP Section 6: Proposal Format.....	34
4.8	RFP Section 7: Evaluation.....	36
4.8.1	Mandatory Criteria.....	36
4.8.2	Weighted Criteria	37
4.8.3	Price Evaluation	39
4.8.4	Budget Breakdowns	45
4.8.5	Shortlist Processes	45
4.8.6	Assistance with Writing Section 7	46
4.9	RFP Appendix A: Contract Form	46
4.10	Additional Appendices.....	48

5	IDENTIFYING AND ADVERTISING TO POTENTIAL PROPONENTS	49
6	ENSURING THE INTEGRITY OF THE REQUEST FOR PROPOSALS PROCESS.....	50
7	THE PROPONENTS' MEETING	52
8	RECEIVING PROPOSALS.....	55
9	EVALUATION OF PROPOSALS.....	57
10	NOTIFYING PROPONENTS OF THE DECISION	62
11	THE CONTRACT	65
12	DEBRIEFING.....	69
13	DOCUMENT RETENTION AND INFORMATION SHARING	71
14	CONTACTS	72
15	GLOSSARY AND DEFINITIONS.....	73
16	QUICK LINKS	74

1 INTRODUCTION

A Request for Proposals (RFP) is one of the standard solicitation strategies used by government to compete contract opportunities. An RFP is most often used to acquire services, although it may be used in some circumstances to acquire goods. A successful RFP process will support the principles of fair, open, and transparent procurement; it will satisfy the ministry's business requirements; and it will meet the expectations of government policy, applicable trade agreements, and common law. This guide has been developed to help ministry employees successfully navigate the RFP process, **and is specific to the updated RFP template that was released in 2016**. Well-prepared RFPs can go a long way to creating effective solutions and programs with reliable contractors.

Information on a wide variety of procurement-related topics can be found in the [BC Bid Resources](#) web site. For specific information on when to use the RFP and other solicitation methodologies, refer to the page [Select a Solicitation Process and Template Guidelines](#).

If looking for specific information in this guide, refer to the Table of Contents for guidance, scan the questions on the left-hand side of the guide, or search for key words and terms. This guide uses the same phrases found in the RFP, for ease of reference.

What is in this guide?

This guide:

- relates specifically to the updated RFP template released in 2016;
- identifies the *musts* in the RFP process, as dictated by government policy and common law;
- outlines government's responsibilities throughout the RFP process, from developing and issuing an RFP document to awarding the contract to the successful proponent;
- provides step-by-step guidance on how to prepare an RFP document and manage issues that may arise;
- includes samples that illustrate suggested approaches to documenting different steps in the process;
- provides guidance on the release of information related to an RFP; and
- includes links to other resources that are relevant to the RFP process.

Does this guide apply to the Joint Solution or Negotiated Request for Proposals processes?

No. The Joint Solution Request for Proposals (JSRFP) and the Negotiated Request for Proposals (NRFP) processes have been developed by the [Procurement Services Branch](#) (PSB) for complex opportunities where a traditional RFP process may not be sufficient. The JSRFP and NRFP processes have been successfully applied to complex alternative service delivery initiatives and information technology procurements that require a more collaborative process than can be achieved with the traditional RFP process. PSB manages all JSRFPs and NRFPs, and provides the necessary guidance throughout this type of procurement process. More information on JSRFPs and NRFPs can be found on the BC Bid Resources page [Award to Highest Score](#).

Does this guide apply to RFPs issued by all public sector organizations?

No. This guide applies only to RFPs issued by ministries in the Government of British Columbia. It reflects the expectations of government procurement policy as defined in [Chapter 6 of the Core Policy and Procedures Manual](#).

Other public sector organizations may choose to use this guide, and government's standard RFP and contract forms, particularly if they have adopted government's procurement policy.

Which government offices have a role in the RFP process?

Responsibility for the RFP process is decentralized in government; more information can be found on BC Bid Resources, under [Procurement Framework](#).

In addition, the [Procurement Community of Practice](#) (PCoP) provides useful tools, templates, information and resource connections specific to government procurement. Note that the PCoP include both ministry and broader public sector members; information posted or presented by non-ministry members may not be suitable for ministries.

When would the Procurement Services Branch issue an RFP on behalf of a ministry?

Government policy ([Core Policy and Procedures Manual 6.3.5 a 9](#)) requires that all RFPs for Information Technology purchases valued at \$500,000 or more, and any RFPs for goods over \$5,000 ([Core Policy and Procedures Manual 6.3.2 b 1](#)), be competed through the [Procurement Services Branch](#) (PSB). In addition, PSB must review all RFPs for Information Technology purchases valued at between \$100,000 and \$500,000, as well as any procurement using alternate formats to the RFP template, such as the JSRFP or NRFP. Any procurement in which the standard format RFP template will not be used, or in which the standard RFP template terms and conditions will be modified, requires the involvement of PSB as well as the [Legal Services Branch](#).

At the request of ministries, PSB can assist with any and all aspects of an RFP for service opportunities. Except as noted above, a ministry may request PSB's input on a draft RFP that they issue themselves, or an RFP may be issued directly by a ministry with PSB as the contact location, or PSB may issue the RFP on behalf of a ministry. Ministries also have the option of completely managing their own RFPs with no PSB involvement (except as noted above).

What if an answer can't be found in this guide?

Detailed information on the full procurement lifecycle can be found in the [BC Bid Resources](#) web site. [Procurement Services Branch](#) (PSB) and [ministry procurement specialists](#) can provide assistance and answer any questions regarding government procurement processes, including the RFP process. Within [PSB](#), there are experienced staff available to help ministries develop RFP documents and manage the RFP process, including IT procurements.

Questions regarding interpretations of government procurement policy or requests for advice on how to respond to vendor complaints should be directed to the Office of the Comptroller General, [Procurement Governance Office](#).

Questions about improvements to this guide can be directed to [Strategic Business and Procurement Transformation](#).

2 THE REQUEST FOR PROPOSALS (RFP) PROCESS

What does the RFP process involve?

An RFP can range from a single-step process for straightforward procurement opportunities to a multi-stage process for complex and significant opportunities. However, the RFP is not always the best solicitation tool; refer to [Select a Solicitation Process and Template Guidelines](#) for more information on alternatives that might be better suited to a specific requirement.

A multi-stage process may involve the use of an information gathering phase and/or a pre-qualification process before the RFP is issued. Refer to [Market Research and Notifications](#) for details on gathering market information, and to [Request for Qualifications](#) for more information on the pre-qualification process.

What is a proponent?

When proposals are invited by government, the term *proponent* is defined in the RFP template as an individual, company, or society that submits, or intends to submit, a proposal. In government, the terms *vendor*, *supplier*, *proponent*, *successful proponent* and *contractor* are sometimes used interchangeably, which may cause confusion for some proponents. Therefore, ministries are advised to differentiate the meanings of these words in their RFPs (if applicable) as follows:

- a vendor is any party (individual, business, or society) that is in the position of being able to sell goods or services to government;
- a qualified supplier is a vendor who has been selected through a qualification process (e.g. Request for Qualifications) to supply government with goods or services;
- a proponent is a vendor who submits or intends to submit a proposal in response to an RFP document;
- a successful proponent is a proponent who is the frontrunner in the evaluation process (i.e. has scored highest), but a contract has not yet been executed; and
- a contractor is the successful proponent after the contract has been fully signed and executed.

3 PREPARING THE REQUEST FOR PROPOSALS (RFP) DOCUMENT

3.1 RFP Template

Is there a standard corporate Request for Proposals template?

Yes. A Request for Proposals (RFP) template is available on the [Solicitation Templates](#) webpage. Use of this template is mandated by [government policy](#) (Policy 6.3.2.a.5), as it reflects the requirements of government policy and common law as it applies to an RFP.

The terms and conditions contained in these standard templates are modified from time to time to reflect changes in legislation or contracting practices. To ensure the most appropriate language is included in each RFP and subsequent contract, ministry employees should only use the most recent versions of the RFP template. The links above will take readers to the most current version of the RFP.

For more information about whether the corporate RFP template is the appropriate template to use, refer to [Select a Solicitation Process and Template Guidelines](#).

What does the corporate template include?

The corporate RFP template has been designed to ensure that key information is communicated to proponents and that all proponents have access to the same information. [Government policy](#) (Core Policy and Procedures Manual section 6.3.2.a.7) requires that all proponents be provided with identical information.

The RFP template requires inclusion of:

- contact information;
- the rules of the RFP process, both administrative and legal;
- the ministry's specific requirements and any relevant background information;
- any planned Proponents' Meeting(s);
- specific directions for the content and format of proposals; and
- an overview of how the successful proposal will be determined.

3.2 Customized RFPs

Can ministries create their own RFP format?

Government policy requires ministries to use the standard RFP template that has been approved by Legal Services Branch. The RFP template is designed to give ministries flexibility on what information to request from proponents, and how that requested information will be evaluated and the award made. Some ministries have their own ministry-specific RFP template, but these must be approved by Legal Services before they can be used.

If a proponent challenges the legality of an RFP process, government must rely on the terms and conditions built into the RFP template as part of its response to the

proponent. Therefore, changing the wording in the template may remove some of the protective language developed by Legal Services Branch, thus creating risk and potential liability to government. If ministries believe that something in the template is not applicable to their project or that a template clause needs to be added or edited, advice should be sought from the [ministry's procurement specialist](#) or [Procurement Services Branch](#) (PSB) and [Legal Services Branch](#) before changes are made.

3.3 Small Projects

What if the project is very small and straightforward?

An RFP does not need to be complex. The template provides standard directions and wording, to which a ministry can add additional straightforward requirements. To select the appropriate solicitation process and template, ministries should refer to [Select a Solicitation Process and Template](#) for guidance.

If the value of the service contract is under \$75,000, ministries can limit the RFP competition to a minimum of three vendors known to be capable of delivering the services, and focus the solicitation on key elements (e.g. price).

The key is to ensure the cost and complexity of the RFP process—both to government and to interested vendors—is reasonable given the potential value and complexity of the contract.

3.4 Complex Projects

What if the project is very complex or multi-phased?

In appropriate circumstances, the RFP template can be used even in the case of complex, multi-phased projects and projects that involve delivery of more than one service in more than one location. Ministries are advised to contact their [ministry procurement specialist](#) or [Procurement Services Branch](#) (PSB) for assistance in preparing RFPs for complex projects and for assistance with determining if the RFP template is the appropriate procurement process for a particular opportunity.

4 USING THE REQUEST FOR PROPOSALS TEMPLATE

The electronic [Request for Proposals Template](#) includes *blue instructions* to help ministries develop a Request for Proposals (RFP) document that is tailored to their requirements while retaining the language necessary to protect the Province. The template may look long and complex at first glance but by following this guide, it should be fairly straightforward to complete, depending on the complexity of what is being purchased.

Are there standard sections in every RFP?

The RFP template is organized as follows:

- an instruction page, that is to be deleted before the RFP is finalized;
- a two-page cover section that identifies the RFP name and number; the closing date and time, how to deliver proposals, the ministry contact person, space for the proponent to confirm their intent to be bound to the RFP process, an optional cut-off date or time for receiving questions, any scheduled Proponents' Meeting(s), and guidance for environmental considerations for proposal delivery;
- table of contents;
- a brief description of the program or project for which vendors are being asked to submit a proposal (i.e., a summary of the requirement);
- the RFP process rules, that include definitions of terms used in the document and an overview of administrative requirements;
- a brief description of the issuing ministry's mandate, the existing situation in the ministry or program area issuing the RFP, and the scope of the services that is the subject of the RFP;
- a reference to where the contract terms and conditions can be found, a listing of any contractor responsibilities that will be included in the contract, and identification of any documents that are relevant to the services;
- a description of what proponents should address in their proposals;
- information on the expected proposal format, such as the structure and length of the document;
- an overview of how proposals will be evaluated, including mandatory criteria, the point breakdown for weighted criteria, and how price will be evaluated; and
- an appendix with the terms and conditions that will be included in the contract with the successful proponent.

4.1 RFP Cover Section

What is the cover section?

The two-page cover section contains six major subsections:

1. basic information;
2. delivery of proposals;
3. intent to be bound;
4. government contact;
5. proponents' meeting; and
6. environmental considerations.

What is included in basic information, and why is it important?

The basic information subsection provides proponents with critical information about the RFP, including the RFP title; issuing ministry; RFP number; issue date; and closing date and time.

This information enables proponents to identify by name and number the specific RFP, and ensures that the closing date and time is clearly identified. Remember that only those proposals that arrive on time and in accordance with submission requirements can be considered, and therefore proponents must easily be able to find this information.

Why are there options for delivering proposals?

The delivery subsection describes how proposals will be received. It is recommended that the submission information appear in the cover section only and not elsewhere in the RFP to reduce the risk of inconsistency. The RFP author has three options when directing proponents on how to submit their proposals; and can provide for one, two or all three options, giving the proponents a choice as to how to submit. Ministries should allow more than one delivery option, wherever feasible.

The first option is electronic proposals via the BC Bid website, (i.e. e-bids). Note that this option can only be used if the RFP is posted on BC Bid; if restricted to a pre-qualification list (see [Request for Qualifications](#)) or if the contract value is under the applicable thresholds for posting (see [Posting Threshold Guidelines](#)), the ministry can direct the RFP to the selected vendors only rather than posting to BC Bid.

The advantages of this option are:

- electronic proposals can be conveniently shared among the evaluation team, and can be searched if specific information is difficult to find in a proposal;
- BC Bid is convenient and more secure than the other electronic option, email (see below); and

- as the e-bidding key is considered the equivalent of a signature, the risk of receiving an unsigned proposal is reduced.

The disadvantages of using e-bidding include:

- the cost to vendors to use the e-bidding functionality (\$150 per year);
- the RFP writer must remember to allow e-bidding when posting the opportunity on BC Bid, and then must remember to look on BC Bid to determine if any e-Bids were received (refer to [How to Use BC Bid for Government Staff](#) for information on the BC Bid functionality); and
- occasionally, proponents may submit an e-bid using a proposed subcontractor's e-bidding key or the e-bidding key of a subsidiary or affiliate, despite instructions to the contrary, and this may result in ambiguity as to whether the proponent is bound to the proposal. Contact the [ministry's procurement specialist](#) or the [Legal Services Branch](#) for advice if this occurs.

If e-bidding is allowed, be sure to set BC Bid to accept e-bids; the default settings will not need to be changed if e-bidding is not an option. Refer to Post Opportunities for more information.

The second option is hard copy, where the proponent delivers the number of paper copies indicated on the RFP as well as an electronic copy to the address provided. The advantages of this option are:

- proponents are familiar with this method of communication;
- proponents can ensure that the finished proposal is collated properly, and looks as they intend;
- the electronic copy can be used to distribute the proposals to the evaluation team and to search for specific words in the proposal; and
- ministry staff who prefer to work from hard copy submissions do not have to print the proposals and take on the risk that pages are missed or collated incorrectly.

The disadvantages of this option are:

- the cost to the vendor for printing and delivery;
- the time it takes to deliver the hard copy proposal, particularly if a vendor is located in a remote area or far away from the closing location;
- if the vendor forgets to sign their proposal, the proposal must be rejected as it missed a mandatory requirement of the RFP; and
- the possibility that the electronic copy and the hard copies do not exactly match, meaning that the ministry may have difficulties determining what constitutes the full and complete proposal.

The third and final option is to allow emailed submissions. Although this is very convenient and familiar to both vendors and ministry staff, many risks are inherent with emailed submissions (see [Accepting Emailed Submissions](#)).

What does the *Confirmation of Proponent's Intent to be Bound* section mean?

The subsection headed "Confirmation of Proponent's Intent to the Bound" serves a number of purposes: the proponent is identified by name and representative, the proponent is agreeing to be bound by its proposal, the proponent is agreeing to the terms and conditions of the RFP (the process rules), and finally, the proponent is agreeing that if successful, it will enter into a contract with the Province on the terms and conditions set out in the RFP. After closing, proponents and the ministry do not have the option to make substantive changes to the RFP process, the successful proposal or the contract format provided in the RFP.

The RFP template includes a provision indicating that a proposal is deemed to incorporate the "Confirmation of Proponents Intent to be Bound", without alteration. This means that if the proposal is signed and submitted in accordance with one of the approved signature and submission methods contemplated in the RFP, the proponent is deemed to have agreed to the language set out in this section; as a result, the proponent's signature (or attachment of its e-bidding key which operates as the equivalent of a signature) confirms the proponent's intent to be bound.

What does the *Government Contact* do?

The subsection headed "Government Contact" identifies the ministry's contact person's name, address, and e-mail address (defined as the "Government Contact"). The RFP template instructs vendors to direct any questions about the RFP to the named Government Contact. The Government Contact does not need to be a decision-maker in the RFP process; they are the gatekeeper to ensure that all questions received get routed to the appropriate person for an answer, and that all questions and answers are provided to the vendors (i.e. posted on BC Bid or directed to the selected vendors if the process is limited to select vendors).

Be sure to identify only one person as the Government Contact in order to maintain control over the information provided during the RFP process. **DO NOT INCLUDE A PHONE NUMBER**; all correspondence with proponents during an open RFP should be in writing to protect the integrity of the process.

What is a *Proponents' Meeting*?

The subsection headed "Proponents' Meeting" is the place to inform proponents as to the date, time and location of a Proponents' Meeting if one is being held and whether attendance is optional or a mandatory requirement. If a meeting is not planned, use this subsection to advise proponents that no Proponents' Meeting will be held.

A Proponents' Meeting is an opportunity to meet face-to-face with proponents to ensure a shared understanding of the RFP requirements. The ministry can emphasize or explain important or complex issues, and proponents have the

opportunity to ask questions. Not all RFPs require a Proponents' Meeting; refer to [Strategies to Receive Quality Submissions](#), item c) Answering Vendor Questions for more information on Proponents' Meetings, including what to consider when deciding whether or not one is needed.

How do the environmental considerations impact the process?

The subsection headed "Environmental Considerations for Proposal Delivery" reminds proponents to consider environmentally-friendly options when delivering hard copies. Ministries should also think about the environment when determining how they will accept proposals, and if hard copies are permitted, how many are required (the fewer, the better). Generally, environmental considerations are suggestions only and not requirements and have no impact on scoring or award; however, if there will be scoring for environmental requirements, these must be expressly set out in the requirements and evaluation sections of the RFP.

4.2 RFP Section 1: Summary of the Requirement

How detailed should the Summary of Requirements be?

This section should provide a brief description of the project or program requirement. The descriptions should be sufficient for proponents to understand the requirement in order to form an opinion as to whether they are interested in reading the whole document. It should include a brief description of the most important elements of the requirement, including what services are needed, timelines for service delivery, etc.

Any mandatory requirements that will impact a vendor's ability to respond to the RFP, such as qualifications, minimum experience, service delivery location, or maximum price, should also be included in this section.

The overall length of the summary section should not exceed one page, as the details are provided in other sections of the RFP.

4.3 RFP Section 2: RFP Process Rules

What are the RFP Process Rules for proponents and proposals?

The "rules" of the RFP process (formerly titled the administrative requirements) are the terms and conditions of the RFP process. None of these terms and conditions can be modified without approval from the [Legal Services Branch](#), except as allowed within the template.

Some key terms and conditions include the following:

- By submitting a proposal, proponents agree to all of the terms and conditions of the RFP (clause 2.2).
- How proposals are to be submitted, noting that this section cannot be changed regardless of which option(s) is chosen for the delivery of proposals (clause 2.3).

- Late proposals will not be accepted (clause 2.5).
- Proponents may amend or withdraw a proposal prior to the closing date and time. All proposals become irrevocable upon closing time and may not be changed. (clause 2.9).
- The Province may terminate contract finalization with the successful proponent if a written contract has not been reached within thirty days after the proponent was notified (clause 2.14).
- Proponents are entitled to a debrief (clause 2.15).
- The Province makes no commitment to make an award (clause 2.19).
- The Province can disqualify a proponent whose name is not clear in the proposal, and can confirm the legal name of the successful proponent prior to signing a contract (clause 2.21).
- The Province has the right to modify the terms of an RFP at any time, to accept proposals with a non-material irregularity, defect or deficiency, and to cancel an RFP at any time prior to entering into a contract with the successful proponent (clause 2.22).

How are definitions managed?

Clause 2.1 Definitions defines a number of terms that are used throughout the document, including: *must*, *mandatory*, *should*, *weighted*, *proponent*, and *Province*. The terms *contract*, *contractor*, and *ministry* are also defined to explain exactly which contract, contractor, or ministry is being referenced.

Throughout the RFP document, consistent use of the defined terms is important. For example, ministries should use the word Proponent rather than any other word or term, such as *bidder*, *tenderer*, *service provider*, *company*, *vendor*, *supplier*, or *offeror*. By the same token, the document should always be referred to as the *RFP* and the responses should be called *proposals* not quotes or tenders.

When using a word or term in its defined meaning, be sure to use the same capitalization as used in the definitions. For example, write “Contract” when referring to the contract that will result from the RFP, and “contract” when meaning any other contract.

To add clarity to the RFP document, define acronyms, words and terms that have a specific meaning to the requirement. Include these definitions with the boilerplate definitions, inserting them in alphabetical order. For example, if the RFP refers to a requirement for CWB certification, the RFP should define CWB as the Canadian Welding Bureau and the RFP should define the requirements for being CWB certified.

What if more than 90 days are needed from the RFP closing to sign the contract?

Clause 2.6 states that proposals will be open for acceptance for at least 90 days after the Closing Time. However, this timeframe can be extended to 120 days if there is a compelling reason for this extension. For example, the additional time may be needed for a shortlist process (e.g. presentations, interviews, systems testing, etc.), or for finalizing multiple contracts that will result from a single RFP.

Do not increase the proposal validity period solely due to the availability of the evaluation committee. If evaluators' time is a concern, post the RFP for a longer period, minimize the information requested in proposals, or reconsider who is on the committee.

What happens if multiple vendors may be included in a single proposal to deliver the services?

Clause 2.11 has been worded to allow proponents to submit a proposal where one vendor is the proponent and all others are proposed subcontractors. If such a proposal is successful, the Province will enter into a contract with the proponent, and all the other vendors will be named as subcontractors. The contractor is responsible for all deliverables, including those provided by the subcontractors. The Province has no direct relationship with the subcontractors.

For some RFPs, proponents may prefer to offer a joint proposal. A joint proposal is a proposal from two or more vendors who will form a new legal entity in the event that their proposal is successful. They do not intend to have subcontractors, but this new legal entity does not yet exist, which creates an inconsistency with clause 2.11. If this model is anticipated in proposals and is acceptable to the ministry, contact the [ministry's procurement specialist](#) and [Legal Services Branch](#) for assistance with revising the process rules to accommodate joint proposals.

4.4 RFP Section 3: Situation / Overview

What should be included in the *Situation / Overview* section?

The Situation/Overview section is intended to give readers information on who is issuing the RFP, what led to the release of the RFP, and the scope of the purchase. For some RFPs, this section will be short and straight-forward, whereas others may be complex with detailed information that proponents will need to understand.

This section is usually divided into three subsections: Ministry Responsibility, Background and Scope. However, ministries may delete and/or add subsections, as required.

What should the *Ministry Responsibility* subsection address?

To provide proponents with the context for a specific requirement, it is useful to describe what the ministry program or branch is currently responsible for and how the project will affect the program's business or function. This section should briefly describe these responsibilities, and may link to websites that provide more details.

Note that although ministry responsibilities overall are extremely important to government staff, this section should focus only on those responsibilities that are

directly correlated to what is being purchased; a broader picture is not usually required in the RFP, but can be addressed through the links provided.

Why is a *Background* subsection needed?

The *Background* subsection gives proponents information on what the ministry has done in the past and explains why this RFP has been released. For example, this subsection may explain that this is a new service that the ministry has never done before, but which is needed for the following reasons. Alternately, this section may state that the last option to renew the contract with the existing contractor has been executed, and therefore the ministry is going back to the market.

If the services are currently being provided by a contractor, name that contractor and state whether or not they are an eligible proponent. This ensures that all proponents are aware of the current situation, including the possibility of competing against an incumbent contractor.

What should be included in the *Scope* section?

A description of the **scope** should define the breadth and depth of the services being purchased and identify the desired outcomes for completion. Proponents need to understand the current situation as well as the intended program outcomes in order to develop their proposals.

The *Scope* section can contain sub-sections, such as what is out-of scope, the term of the expected contract, and the budget.

If proponents need to thoroughly understand the current state of operations (e.g. the computer systems that they will need to work with, the issues that the ministry is trying to resolve through this contract, etc.), this information can be provided in the *Scope* section. This may result in a very large *Scope* section with numerous sub-sections.

What is the purpose of an out-of-scope subsection?

If related work will be done in-house or by another contractor, or for any reason is not intended to be part of the contract that results from the RFP, add a section that describes this work as being **out-of-scope**. This will give proponents clarity on exactly what would be expected if they were offered the contract. If the RFP is unclear as to what is in scope and what is out of scope, proponents may assume that they are to provide all the related work (or may assume only a portion of the work is included in the proposed price, contrary to the ministry expectations), and will price their proposal accordingly.

Why is it important to identify the length of the contract?

It is important to identify the length – or **term** – of the contract, including any options to renew, in the RFP as proponents are agreeing to enter into the contract resulting from the RFP and the length of term provides certainty as to service commitment and allows proponents to price accordingly. In addition, there may be trade obligations, which require that the duration of the contract be set out in the RFP.

Unless there is a clear business reason for wanting to specify an exact start date (i.e. March 31, 2017 versus “Spring 2017”), ministries should state the expected length of the contract term to provide flexibility as to the actual start date. Some ministries may have restrictions on the overall term that is allowed for their contracts. If in doubt, contact the [ministry’s procurement specialist](#).

What are options to renew?

Options to renew allow the ministry the discretion to renew a contract after its initial term. When identifying the term, state the maximum number of renewals; an unlimited number of renewals is not permitted (see the Core Policy and Procedures Manual sections [6.3.3 e 10](#)). However, core policy does not specify a maximum number of renewals that can be included, or the length of each renewal. Therefore, an RFP could identify a contract term as three years with four three-year options to renew for a potential total of 15 years. However, individual ministries may have developed their own policies or guidance that limit the length of contracts and/or options to renew. Furthermore, the length of the initial term of a contract plus all potential renewals is used to determine the total expected value of the contract; if the value exceeds \$250,000, then ministries will need to consult with [Legal Services Branch](#) as to the form of contract to be used and other policy requirements may apply.

It is important to specify any options to renew in the RFP so that the potential length of a contract is clear to vendors. If the RFP is silent on options to renew, any extensions to that contract would be considered a direct award outside of the scope of the original RFP process.

When considering options to renew, do not be concerned about committing funds for future fiscal years whose budgets have not yet been approved. Government contracts include a provision whereby funds are subject to appropriation and the standard [General Service Agreement](#) (GSA) includes a right for the Province to terminate the contract for any reason whatsoever on 30 days’ notice.

Be sure to describe what happens to the contract price on renewal (e.g. renew on same terms and conditions, including price; renew on same terms and conditions, except price; renew on same terms and conditions and price will be adjusted according to a formula or the Cost of Living Index, etc.) Consult with the [ministry’s procurement specialist](#) or [Legal Services Branch](#) for pricing renewal options.

Why would the RFP disclose the budget?

Disclosing the budget can assist vendors to understand the scope of the services being purchased. Similar descriptions can be used for contracts that vary considerably in costs; consider what might happen if the description in the RFP leads a proponent to believe that this contract would be valued at \$1 million per year when the actual budget is only \$100,000.

Ministries decide whether or not to include **budget** information in the RFP (more information on what to consider when making this decision can be found in part

4.8 Section 7 - Evaluation). There should be a balance between giving proponents enough information so they can prepare sound proposals and providing so much information that the ministry loses the advantages of this competitive process. Often, ministries are concerned that if the budget is released, all pricing proposed will be at or near the budget provided. However, the risk of receiving proposals with pricing above (and sometimes well above) the budget is usually much greater than the opportunity of receiving a quality proposal with a proposed price well within or below the allocated budget. If the budget is well researched, it may be advisable to release that information to help ensure a shared understanding of scope.

If the budget or volumes are estimates only, make it clear that they are subject to change.

4.5 RFP Section 4: Contract

Should all RFP documents include a sample contract?

Yes. Submission of a proposal indicates that the proponent agrees to enter into a contract with the Province if the proposal is successful on the terms and conditions set out in the RFP. For that reason, a standard form contract or the main terms and conditions of the contract need to be set out in the RFP. Section 4 of the RFP advises proponents to carefully review the contract, which should be attached as an appendix (see section 4.9 RFP Appendix A: Contract Format of this guide for more information).

What is the *Service Requirements* section for?

Section 4.2 *Service Requirements* of the RFP template is used to describe any deliverables that are required under the contract (i.e. the contractor does not have the choice not to include them). The RFP template makes a clear distinction between mandatory process requirements that all proponents must meet in order to be considered, and service requirements that only apply to the contractor once a contract is signed.

If the ministry intends to include in the contract set performance criteria, deliverables or other obligations that will apply during contract performance but that are not going to be used as evaluation criteria during the RFP process, such requirements should be included here.

Why would *Ministry Responsibilities* be needed?

This section is useful for clarifying the respective roles and responsibilities of the ministry and the contractor and distinguishing between what the ministry will do and what the contractor is expected to do under the contract.

Explaining the ministry responsibilities in relation to the contract deliverables can be helpful to avoid misunderstandings. If the description of the services is not complete for any reason, the proponents might take this to mean that the missing components are not part of the contract; this may ultimately result in important work being missed because the contractor thought it was out-of-scope and the

ministry thought the contractor was providing it. By having a section on what the ministry will do, any missing components are more likely to be caught either while the RFP is being drafted or by proponents after it is posted.

What is the
Related Documents
section about?

Some contracts resulting from RFPs will incorporate other documents that are important for service delivery. In this case, proponents need to know what those documents contain in order to fully understand their obligations if they are offered the contract. This section should include a full list of all such documents as well as where they can be found (i.e. the URL address or attached as an appendix to the RFP).

Examples of related documents include operations manuals that describe how services are to be delivered, forms that the contractor will need to complete either before the contract is signed or during the contract term, related agreements to be signed by the contractor's staff such as non-disclosure agreements, etc.

If there are no related documents for the RFP, delete this section.

4.6 RFP Section 5: Requirements

What should be
included as
requirements?

The section on requirements should explain what information needs to be provided by proponents in order to be competitive in the RFP process, emphasizing those elements considered crucial for inclusion in a proposal. It is divided into three subsections: Capabilities (i.e. experience, staff, etc., including what proponents should have now to demonstrate their ability to deliver the services), Approach (i.e. how the proponent proposes to deliver the services), and Price (i.e. how much will the proponent charge to deliver the services as described in the RFP and their response to Approach). RFPs are not limited to just these three major subsections; for example, an RFP that includes off-the-shelf software or a computer application may want to add a fourth subsection on system functionality. In addition, some of these subsections may not be appropriate and can be deleted or replaced (e.g. if the RFP is restricted to a pre-qualification list, it may not need a section on Capabilities if this has been evaluated in the [Request for Qualifications](#) process).

How will
proponents
know what the
ministry needs?

It is essential to include benchmarks on what the ministry would find acceptable for all weighted criteria (with the possible exception of price). Benchmarks not only add clarity to what is being sought, but they also help proponents to decide whether or not to respond thereby eliminating proposals from proponents who cannot meet the ministry's needs.

4.6.1 RFP Section 5.1 Capabilities

What should Capabilities address?

Capabilities usually address experience of the proponent organization and/or the key personnel who are proposed to deliver the services. It may also include the proponent's financial viability, computer network capabilities, facilities from which services will be delivered, connection to the local community, etc. Ministries may want additional subsections under section 5.1 Capabilities if multiple criteria are being evaluated (e.g. 5.1.1 Organization Experience; 5.1.2 Key Personnel Qualifications and Experience; 5.1.3 Computer Network Capabilities; etc.)

Capabilities should address all important elements that proponents would have as of the closing date of the RFP that demonstrate their ability to meet the contract deliverables. However, they should not be unnecessarily restrictive, or designed so that only one vendor could possibly meet them.

How should experience be addressed in the RFP?

Proponents need to understand what experience would meet the ministry's needs, and what information should be provided to demonstrate their relevant experience. Therefore, the RFP should describe specifically what is required, and evaluations should be based on this description. This approach encourages proponents to be specific to the elements listed, rather than providing a generic description of their experience which may not be relevant to the specific opportunity.

Be sure that the experience being sought is not limited to experience with the particular ministry or to the Province. The RFP should not give the impression that the Province is only interested in contracting with vendors that it has contracted with before. However, experience could be specific to the public sector, if there are significant differences in how services would be delivered between the public and private sectors. If wanting proponents with public sector experience, be as generic as possible by inviting experience from any level of government, including federal, provincial, state or municipal governments.

The information requested in this section should set out the minimal experience proponents should have; a proponent who describes more experience than the minimum required should expect to score higher in this section. However, if the ministry is only interested in recent experience, it may be helpful to identify an upper limit of experience to prevent proponents from describing, for example, 30 years of experience when maximum points are awarded with experience during only the past 10 years.

Should sub-contractor experience be evaluated too?

If a proponent includes a proposed sub-contractor(s) in its proposal, the sub-contractor's experience can be included in this section and should be evaluated the same as the proponent's experience. Alternately, the ministry may decide to evaluate proposed sub-contractors differently, or to not allow sub-contracting at all. Whatever the approach chosen, the RFP should clearly explain how proposed sub-contractors will be treated. If named subcontractors' experience is evaluated and included in the weighted criteria, there should be a corresponding requirement for the successful proponent to use the named subcontractors in the delivery of services under the contract.

Whose experience should be evaluated?

RFPs can include evaluations of the organizational experience and/or one or more individual's qualifications and experience. However, the RFP should be clear on what will be evaluated.

If evaluating both organizational and individuals' experience, sub-headings should be used in the Capabilities section to clearly differentiate what is being sought for each.

When should organizational experience be evaluated?

Evaluate the **organizational experience** if:

- The nature of the services is such that various types of resources or experts will be needed at different points of time;
- Timelines are critically important, and therefore the ability to replace resources who are unexpectedly unavailable is required;
- Established corporate approaches to change management, business continuity planning, access to information, etc. are important to service delivery; and/or
- The services are of a generic nature, and individual expertise is not critical to successful delivery.

If evaluating organizational experience, consider what may happen if a single owner-operator responds to the RFP. If the services can be delivered by just one individual, will the ministry consider only his/her experience as an independent contractor, or will this person's experience be considered regardless of where it was obtained? Both approaches are equally acceptable, provided that the RFP is clear on how such a response will be evaluated.

When should only one individual's experience be evaluated?

Evaluate **one key individual** if:

- One individual's experience is critically important to the success of the contract; and
- Contract success is highly dependent on specific expertise that is not commonly found.

When should a team's experience be evaluated?

When evaluating an individual's experience, where the individual was employed at the time the experience was gained should not be relevant. The experience being evaluated could have been gained while working for the individual's current employer, one or more previous employers, and/or for themselves.

If an individual's experience is evaluated and included in the weighted criteria, there should be a corresponding requirement for the successful proponent to use that individual in the delivery of services under the contract.

Evaluate a **team of individuals** if:

- The services cannot be delivered by only one individual due to volume of work and/or timelines;
- Contract success is highly dependent on expertise in diverse areas that are unlikely to be found in a single individual; or
- The ability of the team to work well together is important to evaluate.

Again, where the team of individuals gained their experience should not matter. However, if experience working together as a team on previous projects is important, explain this in the RFP and ask for a description of past projects where the proposed team worked together.

If asking for the experience of a team of individuals, don't be vague on how many people should be proposed. This may cause issues for evaluators if some proposals name two or three individuals and another proponent names ten or twelve. Instead, use one of the following two options:

- a) Ask proponents to propose a team by identifying individual team members and their roles, and to describe individual team members' qualifications and experience. Explain how the ministry will evaluate proposals where multiple people are named into a single role, and if one individual is named into more than one role.
- b) Ask proponents to propose a team by identifying roles and responsibilities. If using this option, the RFP should specify a minimum number of members expected for the team, and should identify the qualifications and experience expected overall (i.e. not everyone needs to meet everything cited provided that the team overall does).

The RFP should not ask for the experience of everyone who may be involved in the delivery of services. If requesting information on multiple individuals' experience, include only those roles that are critical to the success of the contract. The RFP may state that it's understood that others will likely be involved in the delivery of services, but that the Province is

only interested in evaluating the experience of those proposed for the key roles.

If an individual team member is named and that individual team member's experience is evaluated and included in the weighted criteria, there should be a corresponding requirement for the successful proponent to use that individual team member in the delivery of services under the contract. The contract should include a process for approval where the individuals named may change after the contract is signed.

How will proponents know what experience is being evaluated?

For **organizational experience**, wording similar to the following may assist proponents in understanding what to include in their proposals for this section (edit to suit what is being sought in proposals):

"This section of the RFP is seeking information on the experience of proponent organizations and their proposed sub-contractors, if applicable. If the proponent or proposed sub-contractor is a single owner-operator, the experience of that owner-operator will be considered. Otherwise, the experience of individuals will not be considered when evaluating responses to this section of the RFP."

If evaluating **one individual's experience**, the following sample wording could be useful (edit to suit what is being sought in proposals):

"This section of the RFP is seeking information on the experience of the individual proposed for this role, regardless of where this experience was gained (i.e. while working for the proponent, a proposed sub-contractor or another organization, or while working for him/herself)."

When evaluating a **team's experience**, wording similar to the following can be used, once edited to suit the RFP requirements:

"The experience of the individuals proposed for the team will be evaluated for this section, regardless of where that experience was earned (i.e. while working for the proponent, a proposed sub-contractor or another organization, or while working for themselves).

Preference will be given to proposals where the proposed individuals have worked together in past projects. "

How can proponents be encouraged to provide specific and relevant details about their experience?

When evaluating experience – whether it’s organizational or specific to one or more individuals – RFPs should describe what basic experience is expected. However, be careful of using subjective words such as “similar” and “recent”, as these words may not have the same meaning for everyone.

The RFP can ask for “similar” when the subjective word “similar” is defined. Refer to Mandatory and Weighted Criteria, under the sub-heading “[Writing Weighted Requirements](#)” for more information on how this may be done.

How can proponents be encouraged to include only recent relevant experience?

Put a minimum and maximum time limit on what experience will be considered – e.g. “similar experience within the past x years as of the Closing Time” or “at least three years’ experience’ within the past x years”. Without this, a proponent may describe their relevant experience from 20 years ago, which is likely too long ago to demonstrate their current abilities or not to meet the minimum experience requirements.

Proponents that describe how they meet the stated minimum experience – e.g. “at least three years” – should receive a basic meets requirements score. Those proponents who describe less experience should score lower, and those who have more should score higher.

Imposing a maximum time limit also means that any experience beyond the time frame specified will not be evaluated; this will save time for both proponents and the ministry, as not all relevant experience for the past 20 years needs to be described or evaluated. This approach also indicates how a proponent would score 100% of the points allocated to experience. For example, if the upper limit is within the past seven years, a proponent that has experience in all elements defined as “similar” for all of the past seven years scores 100% of the available points.

How the ministry intends to score experience (i.e. the difference between a meets-requirements score and 100% score) should be explained in the RFP, to ensure that proponents understand how to maximize their scores in this area.

Are there common pitfalls to evaluating years of experience?

Yes. Following are a couple of common issues that can occur, with suggestions on how to address each.

Calendar Year vs Twelve Months: A proponent could interpret “years” to mean calendar years. For example, if the RFP states that proponents should have three or more years’ experience, a proposal may state that a project beginning in December of 2014 and ending in January 2016 meets the requirement as it applies to three calendar years. In order to avoid treating a 14-month project the same as a 36-month project, the expected

experience should be expressed as months rather than years (e.g. 36 months rather than three years).

Simultaneous Projects: Proponents could have had simultaneous projects that meet the experience being sought. The RFP should explain how overlapping dates will be managed in order to avoid any confusion on what would meet or exceed the requirements.

If simultaneous experience will be counted only once for years of experience, adapt the following language to make this clear:

“When evaluating experience, dates that overlap will be considered only once. For example, if Project A was delivered from September 2012 to March 2014 (19 months overall) and Project B was delivered from April 2013 to March 2016 (36 months overall), the overall experience evaluated will be from September 2012 to March 2016, or 43 months overall.”

Alternately, the ministry may decide to count overlapping dates individually. In this case, the following language can be adapted:

“When evaluating experience, dates that overlap will be considered individually. For example, if Project A was delivered from September 2012 to March 2014 (19 months overall) and Project B was delivered from April 2013 to March 2016 (36 months overall), the overall experience evaluated will be the sum of these projects, or 55 months even though that experience was gained within 43 months overall”

Either approach is acceptable. The point is to be clear in the RFP in order to set appropriate proponent expectations.

Are there alternatives to years of experience?

Yes, the RFP writer has options when evaluating experience. Organizational or individual’s experience can be evaluated based on the years of similar experience, or based on the number of similar projects they have completed. Either approach is perfectly acceptable, provided that the RFP is clear on what proponents are expected to include in their proposals.

What determines which approach is better for evaluating experience – years or projects?

Years of experience works well when the experience gained is generally over longer term projects, lasting over a year each. Examples of these types of services include application support and maintenance, nursing services, project management of large projects, curriculum development and delivery, etc. These types of contracts generally are in place for several years, and often include an overall effort of one or more full time equivalents.

Evaluating projects may work better if the experience being sought is likely shorter-term and/or part time work. For example, experience in services

such as facilitation, expert advice consultations, website design, etc. was likely gained by working on multiple projects simultaneously.

This approach can also work well if the ministry wants proponents who have worked on large, complex, multi-year projects.

What should the RFP include if number of projects will be used to evaluate experience?

If using the number of projects rather than years to evaluate experience, determine the minimum number of projects that would demonstrate the basic skills and abilities needed. Be reasonable in the number requested, as this will directly affect the number of qualified proponents. Remember that the RFP process does not need to include all relevant projects, but rather the best examples that demonstrate the proponent's abilities.

The RFP should define what projects are deemed to be relevant or similar; a numbered list can be useful for this definition. Be specific to each project; do not use "years of experience" in this definition, as it is inconsistent with the description of a single project. However, the definition could be a minimum length of time from start to finish.

Following is an example of how to define relevant or similar projects, adapted from several solicitations that have been posted on BC Bid:

"Proponents should have delivered two (2) or more projects within the past seven (7) years (as of the Closing Time of this RFP) of a similar scope and complexity. Similar scope and complexity may include without limitation:

- a) Developing measures specific to the principles of prevention, early identification and intervention, and risk reduction that demonstrates reductions of mental health problems in children and youth;
- b) Completing the project in no less than four months, from initial start-up to final deliverables;
- c) Managing no less and 20 calls on average in each 24-hour period over no less than a four-month period;
- d) Using a team of resources with no less than three individuals, including at least one individual with formal education in project management; and
- e) Developing training curriculum (including Instructional Systems Design skills as well as subject matter expertise in Discrimination Prevention)."

Are there common pitfalls to evaluating experience using projects?

The most common issue that can happen when asking proponents for projects that demonstrate their experience is the number of projects that may be included. Some proponents will only provide the minimum requested in the RFP, whereas others may provide dozens of projects.

To avoid this situation, the RFP should include instructions as to the maximum number of projects that will be considered or, alternately, to describe a set number of projects (e.g. the most recent four projects). This will help to focus proponents on only the most relevant projects, which can save time for both proponents and evaluators. However, proponents may not follow these instructions and may include more than the maximum number of projects. Therefore, clear consequences should be stated, such as:

“The Province will only evaluate up to six projects; if more projects are included in the proposal, only the first six will be evaluated.”

An added bonus to this approach is that it defines how a proponent would score 100% of the points allocated to experience. For example, if the upper limit is six projects within the past seven years, a proponent who describes six projects that hit all elements of the definition and were delivered within the time limit would score 100% of the available points.

Should résumés be requested?

Yes, if the RFP includes the evaluation of key personnel (either one individual or a team of individuals). Résumés provide a basis for evaluating individuals’ qualifications and experience. However, to simplify the evaluation process, ministries may choose to provide proponents with a standard framework for summarizing qualifications and experience rather than requesting resumes. Refer to the Request for Qualifications template available on [BC Bid Resources](#) for an example of a format that ministries may find useful.

If not using a template or if including both a template and résumés, consider limiting the size of résumés to two or three pages.

Do all RFPs evaluate experience?

No. Although experience is usually quite important when deciding which proponent will be offered the contract, RFPs do not have to evaluate experience. Experience may not be evaluated if the RFP is limited to pre-qualified suppliers (i.e. where experience was evaluated in the [Request for Qualifications](#) process) or where a certification or licensing process is rigorous enough that experience doesn’t make much of a difference.

What else might be included in the Capabilities section?

Besides experience, the Capabilities section may include a number of other factors that demonstrate a proponent's ability to provide the required services. For example, the Capabilities section may include:

- Qualifications, either for named individuals or certifications or licenses specific to the organization;
- Financial viability;
- Formal corporate policies and procedures related to human resources, finances, dispute resolution, etc.;
- Facilities, where the proponent describes current or proposed space from which the services will be provided;
- Equipment that will be used to deliver the services; and
- Connections to the community, if the services include referrals to and/or from other community organizations.

This list is not exhaustive, but all have one thing in common: they demonstrate the current capacity and ability of the proponent to deliver the services. Not all of these options may be appropriate to every RFP; consider what is most important and be selective for those items that will differentiate one proposal from another.

If including any of these elements in the RFP, be sure to describe what would meet the ministry's basic requirements. This ensures that every proponent has a reasonable understanding of what is being requested in order to determine whether or not they should participate in the RFP, and what to include in their proposals.

What should financial viability address?

If the RFP is requesting information on proponents' financial viability, be clear on how such viability would be determined. Usually, two or more factors should be considered to adequately address this topic. For example, benchmarks may include a minimum number of years in constant operation, a minimum market share as determined by a named authoritative source (i.e. not the proponent or the Province), available cash and credit that equals one or more months of all operating expenses, a minimum net income in each of the last three years, etc.

When developing this section of the RFP, consult with a ministry financial expert for advice on what to include that demonstrates financial viability for the services being sought. Different industries may have different criteria or expectations on how this can be addressed.

How important is it to request references?

References can be an important step in confirming the reliability and capability of proponents. If references are requested and will be checked, the RFP should explain how the process will work. Checking references

can be time-consuming but can also be a valuable source of information during the evaluation.

Refer to [Using References](#) for more information that will assist in determining how to use references. If contracting for services with an estimated value of \$10 million or more, refer to the Vendor Reference Check Review Policy (Core Policy and Procedures Manual, section [6.3.3.b\(1\)](#)) and the [Reference Check Review Guidelines](#).

Except for the options provided, do not alter the language in the References section without first seeking advice from the [ministry's procurement specialist](#) or the [Legal Services Branch](#).

How do references impact the process?

The RFP template includes language that allows ministries to use references as a pass/fail criterion. This approach means that no points are associated to references, but that the ministry could exclude a proponent from consideration if one or more references are unsatisfactory. However, if a ministry is going to exclude a proponent due to a negative reference, consult first with the [Legal Services Branch for advice](#).

Are there alternatives to the pass/fail approach for references?

The best approach for references is to use them as a pass/fail criterion. It can be problematic to assign points to references and score them, as the Province would be relying on information that was not provided by the proponent but that may influence the final ranked order. If there are unique circumstances that may warrant considering an alternative to the pass/fail approach for references, contact [Procurement Services Branch](#) and [Legal Services Branch](#) as this may require changes to the standard template.

What are *Environmental Requirements*?

Environmental Requirements are those elements of service delivery where environmentally friendly products or activities are available to proponents. Examples include using electronic options such as Live Meeting rather than travelling, having hybrid vehicles and anti-idling practices as part of service delivery, using recycled and recyclable materials, etc.

The *Environmental Requirements* section is optional for ministry RFPs. If proponents who offer environmentally friendly choices are preferred, refer to the [Green Purchasing](#) in the BC Bid Resources website for ideas and language that can be copied into the RFP, as applicable. If *Environmental Requirements* is not relevant to the RFP, remove this section.

4.6.2 *Response Guidelines*

What are *Response Guidelines*?

Response Guidelines are the instructions to proponents on what information to include in their proposals. Response Guidelines are not questions, but rather directions on what to provide. Use words such as

“describe”, “explain” “provide”, “identify” etc. when writing Response Guidelines.

Each Response Guideline is specific to one or more benchmarks provided; no Response Guideline should be without a benchmark (with the possible exception of price), and no benchmark should be without a Response Guideline.

Response Guidelines are located at the end of each of subsection of Section 5 *Requirements*, and should be consecutively numbered for all subsections. This will avoid ambiguity about which Response Guideline is being referenced in proponent questions and proposals.

Can the Response Guidelines already in the template be changed?

The first Response Guideline should always remain the same – the contact information for the proposal. Note that although the individual signing the proposal will be identified, the contact for the RFP may be someone else. Keep this Response Guideline in order to have clear and complete contact information for each proposal.

Other Response Guidelines can be added or adapted to suit the specific RFP. However, if requesting references, the template language should be used as it provides proponents with clear instructions.

Are Response Guidelines needed for everything?

Response Guidelines should be used for all information expected in proposals (i.e. everything addressed in section 5 of the RFP). This provides the clarity that proponents need when writing their proposals and helps to ensure complete proposals.

Is there a limit on the number of Response Guidelines that can be used?

No, there is no absolute limit to how many Response Guidelines can be included in each RFP. However, ministries should be selective in what they request; the information being requested should be specific to differentiating the best proponent and proposal. Do not request information on absolutely everything that may be required, if certain elements would make little or no difference to the evaluation process. This will ensure that proposals and the evaluation process address only the important elements, which will save time and effort for both proponents and the ministry.

Refer to section 4.5 of this guide for information on how Service Requirements can be used to ensure that proponents are aware of everything that will be required for the contract without the need to address everything in their proposals.

4.6.3 RFP Section 5.2 Approach

What should
Approach
address?

Whereas the Capabilities subsection addresses those elements that demonstrate whether or not proponents currently have the ability to deliver services, the Approach subsection addresses how the proponent intends to deliver the services, if they were awarded the contract. It is specific to those aspects of service delivery where the processes proposed will be evaluated.

The Approach subsection should clearly tie into the scope described in section 3 of the RFP. Consider scope as the overall description of the services required, and Approach as the details demonstrating that the proponent has a viable plan to meet the scope described.

When writing the Approach subsection, be sure to fully describe the deliverables expected from the contract. This may be expressed as a tangible deliverable where the contractor gives something to the ministry (e.g. a report, presentation, survey, etc.) and/or as intangible deliverables where the contractor does something (e.g. fire fighting services, counselling services, system support and maintenance, etc.) Consider the acronym SMART when writing the deliverables, meaning that each deliverable defined should be Specific, Measurable, Achievable, Results-oriented, and Time-bound.

Remember that any service requirements where proponents do not have an option on how to deliver should be addressed under the Service Requirements heading (see section 4.5 in this guide for more information).

How should
the benchmarks
for *Approach* be
written?

Benchmarks for the Approach subsection should focus on the expected delivery outputs or minimum service levels, rather than on a prescriptive methodology.

Consider the following examples:

- Rather than providing a step-by-step process on how to ensure quality deliverables, state the need for a quality control process and include a Response Guideline for proponents to describe the proposed process and explain how it will ensure quality;
- Rather than providing dates when each milestones is to be met, provide a timeframe (e.g. a certain number of weeks or months from contract signing) and have proponents propose their milestone dates in between;
- Rather than identifying a possible solution to an existing problem, explain the problem and have proponents propose their own solution that describes how and why this will solve the identified problem;

- Rather than identifying how many full time equivalents are required for the services, describe what deliverables are expected and include a Response Guideline for information on who is proposed as being responsible for each, how many individuals will be assigned to the tasks proposed, and the overall timeframe when each will be complete; and
- Rather than identifying the hours of operation for the contract, provide the minimum number of hours that services are to be available daily and include a Response Guideline for a proposed daily schedule.

Other benchmarks that may be appropriate are the minimum number of clients the program must serve, or the minimum response time for a system help desk.

Although a certain level of detail is necessary in this description, ministries are cautioned to not get too detailed as creativity in the solution should be encouraged.

4.6.4 RFP Section 5.3 Price

What should
Price include?

In order to ensure a fair evaluation of Price, a clear and unambiguous description of what price is to include is essential.

For example, if the scope of services includes regular and defined travel, some proponents may assume that the associated travel expenses can be billed in addition to the pricing proposed, whereas other proponents may assume that they are to be included in proposed pricing. However, if the RFP is clear – either travel expenses are included in the price proposed or billable at a defined rate – then all proponents can respond and be evaluated on the same basis.

Can the RFP
address
multiple
prices?

RFPs can evaluate one price proposed or multiple prices. However, when writing the Price subsection, be sure to have a fully planned evaluation process for the pricing proposed. If multiple prices are requested, determine whether each price will be evaluated separately, or if the sum of each price will be used for evaluations, or if some other process applies (refer to section 4.8.3 Price Evaluations of this guide).

Keep in mind that each price requested needs a complete and thorough description of what is included in that price.

How should the Response Guidelines for Price be worded?

Following are a few examples of wording that can be used for the Response Guidelines in the Price subsection. Note that these are examples only that may or may not be suitable for a specific RFP.

Example 1:

Provide a firm, fixed, all-inclusive price for all services proposed. The Province will not pay for any costs or expenses not included in the price, unless otherwise expressly provided. *[Author: specify whether fixed price is for entire contract term or is an annual fee; specify if other expenses could be charged separately, such as travel expenses.]*

Example 2:

Provide unit pricing for the services proposed. *[Author: specify type of unit pricing, i.e. Daily Rate based on “x” hours per day; Hourly Rate; Rate per Unit/Deliverable, with cap on Units/Deliverable; consider including a pricing template to be submitted by Proponents].* Unit pricing is to be inclusive of all costs and expenses, unless otherwise expressly provided in this RFP. *[Author: specify if other expenses could be charged separately, such as travel expenses.]*

Example 3:

Provide a firm, fixed, all-inclusive price for each element described in the following table. The Province will not pay for any costs or expenses not included in the pricing proposed in the table, unless otherwise expressly provided. *[Author: specify whether fixed price is for entire contract term or is an annual fee; specify if other expenses could be charged separately, such as travel expenses.]* If more than one price is proposed for a single line item in the table, the highest price only will be used when evaluating price.

4.6.5 Assistance with Writing Section 5

Can ministries get help with writing Section 5 of the RFP?

Yes, [ministry procurement specialists](#) and [PSB](#) staff can help ministries write section 5 of their RFPs, including assistance with defining and developing benchmarks, and how those benchmarks will be used in the evaluation of proposals (see section 4.8 of this guide for more information on evaluations).

4.7 RFP Section 6: Proposal Format

Why is the Proposal Format section needed?

It is a good idea to provide proponents with guidance on how to present their information. If all proposals are organized in a similar manner, the evaluation process will be simplified.

The RFP template includes simple guidance for the format of proposals. Feel free to edit this information to suit how the specific RFP has been structured.

However, proposal formats themselves should not be evaluated unless the RFP:

- includes significant writing services (i.e. more than just status reporting); and
- clearly states that how the proposal is structured will be evaluated.

Why do some RFPs include a checklist?

Many RFPs include a proposal checklist in the *Proposal Format* subsection to help proponents create a complete package that addresses all mandatory and desirable criteria and RFP process rules. The following checklist is provided as an example of what can be included with an RFP, noting that including such a checklist is at the option of the RFP writer and, if included, may have additional or different elements.

- Everyone involved in creating the proposal has read and understood the RFP requirements.
- The proposal meets all the mandatory requirements.
- The proposal addresses all Response Guidelines.
- The appropriate number of copies of the proposal has been made, if applicable.
- The proposal clearly identifies the proponent, the project, and the RFP number.
- The proposal will be at the Closing Location before the Closing Time stated in the RFP document.
- The proposal is being delivered using a method consistent with the terms of the RFP.
- The proponent's name and the RFP number appear on the proposal envelope, if submitting in hard copy.
- The proposal has been signed or has been submitted via BC Bid with the proponent's e-bidding key.
- If the proposal is being submitted through BC Bid's e-Bidding functionality, all file attachments have been uploaded and the proponent's (not any of the proposed subcontractor's) e-bidding key has been entered.

Do not ask proponents to complete and return a checklist; a checklist should be presented as a reminder to proponents to verify that the proposal is complete.

4.8 RFP Section 7: Evaluation

What are evaluation criteria?

Evaluation criteria are considered one of the most important components of an RFP document as they define how proposals will be assessed and what makes one proposal better than another. There are two types of criteria: mandatory criteria and weighted criteria.

Mandatory evaluation criteria are generally set out in Section 7 of the corporate RFP template. Weighted criteria are the benchmarks that were described in Section 5 of the RFP.

What options are available for awarding the contract?

Usually, the contract award is made to the proponent who meets all mandatory criteria and minimum scores (if any), and whose proposal scores higher than all others. However, sometimes a ministry intends to award multiple contracts using just one RFP, for example, where there are different geographical regions that will each be awarded under a separate contract. In this case, edit the language in the *Evaluation* subsection to explain how this would work.

Following are some examples of how multiple awards might be worded:

- “This RFP divides the province of BC into five (5) Regions (see section xx for more information). The Province intends to award a contract to the Proponent with the highest scoring proposal that has met all mandatory requirements and minimum scores in each Region. Proposals from one Region will only compete with proposals for that same Region, not against proposals from different Regions. Therefore, it is possible that an unsuccessful proposal in one Region may score higher than a successful proposal in another Region.”
- “The Province intends to award multiple Contracts through this RFP. All proposals that have met all mandatory requirements and minimum scores will be ranked. The Province intends to award Contracts to Proponents in ranked order, until the remaining budget is insufficient for the next ranked proposal.”

Note that if the RFP is structured so that the highest-scoring proposal(s) wins, which is generally the award scheme, ministries cannot pass over a higher-scoring proposal in order to award to a lower-scoring proposal. Contract awards must be made as described in the RFP without exception, unless the RFP process is being cancelled and no award will be made at all.

4.8.1 Mandatory Criteria

What are mandatory criteria?

Mandatory criteria are requirements that a proposal must meet in order for it to be considered. They are objective, project-related or administrative criteria that, when evaluated, are generally answered with a ‘yes’ or a ‘no.’

If a mandatory criterion is not met, the proposal will not receive any further consideration.

Refer to [Mandatory and Weighted Criteria](#) on the BC Bid Resources website for more information and examples on how to write clear mandatory requirements.

What happens if a proposal misses any mandatory criteria?

Any proposal that misses one or more mandatory requirements cannot be considered. If mandatory criteria are too restrictive or too difficult to meet, there is a risk that good proposals may be rejected. Therefore, it is important that mandatory criteria be critical to the success of the project and that the number of mandatory requirements be kept to a minimum.

Ministries cannot accept a proposal that has clearly missed a mandatory criterion. If unsure as to whether or not a mandatory criterion has been met, contact the [ministry's procurement specialist](#), [PSB](#) or [Legal Services](#).

How should mandatory criteria be worded?

All mandatory requirements should be clearly listed in the RFP, and should avoid subjective wording (e.g. suitable, reasonable, acceptable, similar) unless these words are defined.

Ministries should also take particular care with the word *must*. As this is a defined term, it should be used only when describing a mandatory requirement that must be met in order for the proposal to be evaluated. Before issuing the RFP, do a search for the word "must" to ensure that it has only been used for mandatory criteria.

Repeat all mandatory criteria in the table in Section 7.1 of the RFP. This will give proponents clarity on what the mandatory criteria are, and can also be used as a checklist to ensure that all are met. Use the exact same wording when repeating the mandatory criteria, to ensure no unintended differences of meaning.

Refer to [Mandatory and Weighted Criteria](#) on the BC Bid Resources website for more information and examples on how to write clear mandatory requirements.

4.8.2 *Weighted Criteria*

What are weighted criteria?

Weighted criteria refer to the subsections defined in the RFP under Section 5 *Requirements*. As the details of what proposals should include are set out in Section 5, Section 7.2 only provides the weights and identifies minimum scores if applicable. It is very important that proponents clearly understand how the weightings correspond with the benchmarks; therefore, use the same headings and numbering from Section 5 when completing the Weighted Criteria table.

How should scores be assigned to weighted criteria?

Weighted criteria will be different for each RFP and will reflect the individual needs and priorities of the ministry. The Weighted Criteria table will assist proponents in understanding the relevant importance of the benchmarks provided in Section 5 *Requirements*.

More information on allocating points and determining minimum scores can be found in [Mandatory and Weighted Criteria](#).

Please note that, unless the RFP includes a mandatory budget that proponents must not exceed, if price is given too low an importance, there will generally be an increase in the amount that the government ends up paying.

The following example illustrates a number of weighted criteria, their relative weighting, and a minimum score that must be achieved in each category. Note that this is an example only; the RFP writer needs to determine the relative importance of each subsection to determine what best suits its RFP.

	Available Points	Minimum Score
Capabilities (section 5.1)	80	N/A
Approach (section 5.2)	50	30
Price (section 5.3)	70	N/A
TOTALS	200	

Example 1 **Weighted Criteria Grid**

Are weighted criteria other than those identified in the RFP used?

No. The evaluation committee can evaluate a proposal only in accordance with the benchmarks and weightings provided in the RFP. However, the RFP will not usually show a detailed breakdown of how the ministry intends to award points for each of the criteria.

What are minimum scores?

A minimum score, which is also called an upset score, is the lowest score a proposal can achieve in a category and still receive further consideration. Applying a minimum score can be a good way to avoid ending up with a successful proponent who demonstrates sound competency in most areas but is totally unacceptable in one. It is also an effective alternative to heavy reliance on mandatory requirements to ensure the quality of successful proposals. The RFP template simply states that a proponent not reaching the minimum score will not be further evaluated, meaning that any

proposal not meeting the identified minimum(s) cannot be deemed successful.

Not all RFPs require minimum scores; however, if minimum scores are being used, they must be disclosed to proponents. Ministries can include as many minimum scores as they like, to any category except price, but be careful not to have minimum scores so high that no proposal meets them.

Can a proponent completely miss a category of weighted criteria and still be successful?

Yes. It is possible, but unlikely, and can only occur if there is no minimum score assigned to the category. If the RFP uses minimum scores, it would not be possible since a proposal that does not achieve any of the minimum scores defined in the RFP will not receive further consideration during evaluation. In example 1 (i.e. the table above), under Approach where a minimum score of 30 is identified, the ministry has decided that the proposed methodology is sufficiently important that it is unwilling to enter into a contract with a proponent that did not have at least a minimum level of detail on how services would be delivered.

4.8.3 Price Evaluation

Why does the RFP template address price evaluations differently from other weighted criteria?

The RFP template includes a specific subsection where the RFP writer can set out how price will be evaluated.

For weighted criteria other than price, each proposal is evaluated against identified benchmarks.

Price, however, is evaluated differently, as usually the pricing proposed in one proposal needs to be compared against the pricing proposed in other proposals to determine either lowest price overall or best value. Even where a budget is disclosed and could be considered a pricing benchmark, this proposal-to-proposal comparison may still take place. For this reason, the RFP addresses price evaluations differently from other weighted criteria.

Does disclosing the budget make a difference to how price is evaluated?

Yes. The following points highlight some of the options available to ministries for disclosing the budget and evaluating price. Regardless of the approach chosen, the process for evaluating price **must** be clearly described in the RFP.

- 1) A commonly used option is to not include a budget, let proponents offer their best price, and award points during evaluation for price. One of the risks with using this approach is that unless price is given a significant percentage of overall weighting, a proponent with a high price who also scores high for capabilities and approach could be successful, while a proponent quoting half the price and with adequate

capabilities and an approach that would have been acceptable to the ministry may not be successful.

- 2) A second option is to provide an estimated budget figure and award points for price. Including a budget estimate can be helpful in describing the expected scope of services for proponents. Ministries may have reservations about disclosing a budget in case this results in most proposals being priced at or near the disclosed budget; on the other hand, without a budget to gauge the scope of services against there is a risk that proposals will be priced beyond what the ministry can afford. Ministries will need to weigh both of these considerations in deciding whether or not to provide an estimated or maximum budget.
- 3) A third option is to tell proponents the budget and not award any points for price. This can be managed in one of two ways: either the RFP states that the price proposed must not exceed the disclosed budget (i.e. a mandatory requirement), or the RFP states that the contract will be for the disclosed budget meaning that price is predetermined. Ministries can use this option to select the proposal that offers the greatest value for the set budget (e.g., scoring proposals on a “price per point” basis).

What options are available for evaluating price?

There are a number of options for evaluating price, including a comparative formula, price-per-point, and lowest price meeting minimum scores. Each of these approaches is described below:

Comparative Formula:

When awarding points for pricing, a comparative formula can be used where the lowest price gets all the allocated points, and everyone else is scored based on the formula.

The most common formula used is:

Lowest price / this price x points available

Other formulas can be used – just be sure to disclose what it is.

The comparative formula approach works for both those RFPs where only a single price is requested, and those with multiple prices. If multiple prices apply, the formula can apply to each price requested (i.e. where the overall points allocated to price or divided amongst each individual price requested) or to an overall price derived from the individual prices (see the answer to the question “how can multiple prices be evaluated?” below for more information).

Following is an example of the wording that can be used in section 7.3 of the RFP template on Price Evaluation for this approach:

The Province will evaluate price as follows:

- Only those proposals that have met all mandatory requirements and minimum score(s) will be evaluated for price;
- The lowest price proposed will receive all the points allocated to price; and
- All other proposals will be scored using the following formula:

$$\frac{\text{Lowest Priced Proposal}}{\text{This Proposal's Price}} \times \text{Points Available}$$

If using the above formula, a proposal that is twice as much as the lowest price will be awarded half the points.

Assign points to Price if using a comparative formula.

Price-per-point:

This approach works only when a single price is proposed, or where multiple prices are being combined to a single price for evaluation purposes (see the answer to the question “how can multiple prices be evaluated?” below for more information). It does not work for multiple prices that will be evaluated separately.

For this option, do not provide a budget. All other sections of the proposal (e.g. Capabilities and Approach) are evaluated, and no points are allocated to price. Instead, the price is divided by the overall points awarded for the other sections of the RFP to determine a price-per-point. The award is made to the proposal with the lowest price-per-point.

This approach has the effect of ensuring that proponents quoting high prices are less likely to be successful, unless they are offering a superior approach or are extremely well qualified. This approach can often make use of the two-envelope system, where price is not reviewed until all other evaluations are complete.

As an example, consider the following three proposals to a single RFP:

Criteria	Proponent A	Proponent B	Proponent C
Capabilities (40)	25	27	35
Approach (60)	30	50	46
TOTAL	55	77	81
Proposed Price	\$100,000	\$135,000	\$200,000
Price-per-point (Proposed price / Total points awarded)	\$1,818.18	\$1,753.25	\$2,469.14

If using the lowest price-per-point methodology, Proponent B would be the front runner as their price-per-point is lower than the others.

The following wording can be used in section 7.3 of the RFP for this option:

The Province will evaluate price as follows:

- *Only those proposals that have met all mandatory requirements and minimum score(s), if any, will be evaluated for price;*
- *The total price will be divided by the total points awarded to the proposal for Capabilities and Approach [\[insert any other categories that may apply to this RFP\]](#) to determine a price per point for each proposal; and*
- *The proposal with the lowest price per point will be deemed to be the successful proposal.*

DO NOT assign points to price if using this option.

Lowest Price Meeting Minimum Scores

With this option, do not provide a budget and accept the lowest priced proposal that meets all mandatory requirements and minimum scores. The rationale for this approach is that all proponents who meet a minimal threshold will deliver the services in substantively the same way, and therefore there is no advantage to paying more for essentially the same level of service.

At least one minimum score is required for this approach. The following wording can be used in Section 7.3 of the RFP for this option:

The lowest overall price proposed from those proposals that have met all mandatory requirements and minimum score(s) will be deemed to be the successful proposal.

Again, this is sometimes done by asking the proponents to submit their proposals in two envelopes. All proposals are evaluated for everything except price. After this, only those proponents who have attained the minimum scores will have their price envelopes opened. The proponent with the lowest price is the successful proponent. . For this pricing evaluation approach, the minimum score should be significant enough to ensure that the ministry's requirements will be completely satisfied by those that meet the minimum.

DO NOT assign points to price if using this option.

Does price have to be evaluated?

No. Price could be either a mandatory requirement (e.g. must not exceed \$x) or a term of the contract (contract price will be \$x). Be careful with this option, however, as the ministry does not have the option of exceeding the

value disclosed in the RFP if it is a mandatory requirement or a term of the contract. If this option is chosen, following are examples of wording that could be used in the RFP:

Mandatory Requirement: Price will not be evaluated in this RFP. Proposed pricing must not exceed \$x per year.

Term of the Contract: Price will not be evaluated. The maximum payable under this Contract is \$x per year.

Both of these options will ensure that the contract does not exceed the available budget. These approaches are usually only used when the ministry is aware that the full scope of services cannot be done for less than the budget or to determine how much of the described services can be done for the budget available.

Does the RFP have to disclose how price will be evaluated?

RFPs should disclose how proposed pricing will affect scores. A vendor may have cause to [complain](#) about how a contract award was made if the impact of pricing is not clear.

If price will not be evaluated, this should also be disclosed to ensure no misunderstandings as to how the contract award will be made.

How can multiple prices be evaluated?

RFPs can evaluate either a single price (e.g. a fixed, annual amount or an hourly rate) or multiple prices.

If requesting multiple prices, disclose how the price will be evaluated. Here are three options for evaluating multiple prices that can be adapted to suit the specific RFP:

1) Allocate the Pricing Points

This approach entails dividing the overall points allocated to price to each price requested. For example, if the RFP requests five different prices and has allocated 30 points to price overall, the assumption is that those 30 points are evenly divided amongst the five prices, unless the RFP states otherwise. If the intention is to divide the total points for price other than evenly among the prices requested, the RFP should indicate that allocation.

Following is sample wording that could be adapted and used in the RFP for this option:

“Each price requested in this RFP will be evaluated separately. If more than one price is proposed where a single price is expected (e.g. the proposal proposes a range), only the highest price proposed will be used for evaluation purposes. The points allocated to the Price section will be divided amongst each price, and the following formula applied to each:”

By using this option, it is possible for a single proposal to have the lowest price in one pricing category but not in all. For example, if 30 points were divided equally amongst the five prices requested, a single proposal could score 6 in some categories (i.e. the lowest price), with lower scores in other categories where another proposal proposed a lower price.

2) Sum the Total of Each Price

This approach works well if all prices are equally important, and the ministry intends on awarding the most points to the overall lowest price. In this case, each price proposed is added together to determine an overall total. This overall total is then used to evaluate price.

Be sure to include language on what will happen if a proponent makes an error in summing their individual prices, or if not all prices are included in a proposal.

Following is sample wording that could be adapted and used in the RFP for this option:

“Price will be evaluated by using the sum of all the individual prices proposed. Individual prices will prevail if there is a discrepancy between the individual and summed pricing. If more than one price is proposed where a single price is expected (e.g. the proposal proposes a range), only the highest price proposed will be used for evaluation purposes. If any of the prices are not included in the proposal, that proposal will score “0” for Price.”

3) Apply a Pricing Scenario

For this option, apply a scenario that is representative of the approximate purchases that may be made against the final contract. This scenario could be developed from past purchases made or based on current plans. The scenario may entail heavy purchases for some items, with few purchases of others.

Although the scenario does not have to be disclosed in the RFP, it may be prudent to do so. This is particularly true if the scenario is based on past purchases, and the incumbent contractor is expected to participate, since the incumbent would have information that is not likely available to other proponents.

Following is sample wording that could be adapted and used in the RFP for this option:

“Price will be evaluated by applying a sample annual purchase against the individual prices proposed, as per the table below, and using the overall value of that sample year for evaluation purposes. Individual prices will prevail if there is a discrepancy between the individual and extended pricing. If more than one price is proposed where a single price is expected (e.g. the proposal proposes a range), only the highest price proposed will be used for evaluation

purposes. If any of the prices are not included in the proposal, the highest price proposed for that item from all proposals will be used for the missing pricing for the purposes of determining an overall price."

4.8.4 Budget Breakdowns

Can the RFP ask for a budget breakdown?

Ministries occasionally want to ask proponents how the contract funding received would be spent (e.g., percentage of time spent on administration versus percentage of time with clients). This is a reasonable request but ministries must keep in mind that budget allocation is not the same as price and should not be evaluated as such. Planned expenditures (or proponent budget) are more appropriately evaluated as part of the suitability of the proposed approach or in a category on its own.

How should the budget breakdown be evaluated?

If asking for a breakdown of price (i.e. a budget), be sure to explain in the RFP how this information will be used. For example, budgets could be informational only and not be evaluated. Or budgets could be used as part of evaluating the proposed approach, where the reasonableness of amounts budgeted for specific activities will be assessed.

Alternately, the budget breakdown could be assigned its own points and evaluated on its own, either as part of Approach or in its own category. In this case, the budget breakdown could be assessed using the following criteria (as an example):

- the reasonableness of the funding given the approach proposed;
- management and administrative costs that do not exceed 15% of the total available budget; and
- any efficiencies that can be gained through the Proponent's other services offered.

Remember to clearly identify in the RFP whether and how the budget breakdown will be evaluated. If using subjective words such as "reasonableness", provide a definition to ensure clarity.

4.8.5 Shortlist Processes

Can the RFP include a shortlist process?

Yes. Shortlist processes can be built into the RFP process. If the intent is to create a short-list and invite proponents who make the list to do something additional, such as a presentation, interview, systems test, etc., to enable selection of the successful proponent, these additional steps in the evaluation process should be clearly explained in the Evaluation section of the RFP. The RFP should specify:

- how many proponents will be shortlisted;

- on what basis proponents will be shortlisted (i.e., the top three highest-ranked proponents or all proponents that meet the minimum threshold score);
- how much notice shortlisted proponents will be given if they are to participate in an additional evaluation stage; and
- how the successful proponent will be selected from the shortlist (the details of the additional evaluation stage, how points will be awarded if any).

What should be included in the RFP about the shortlist process?

The approach for the shortlist processes is up to the ministry, and, for both the creation of the shortlist and the additional evaluation process to select the successful proponent, could include presentations, interviews, questions-and-answers, demonstrations, or systems user testing. However, the process used to shortlist and select the successful proponent must be the same for each proponent.

4.8.6 Assistance with Writing Section 7

Can ministries get help with writing Section 7 of the RFP?

Yes, [ministry procurement specialists](#) and [PSB](#) staff can provide assistance in evaluating the advantages and disadvantages of each approach, and selecting the best option for specific circumstances.

4.9 RFP Appendix A: Contract Form

What contracting options are available?

The standard RFP template provides three contracting options: (i) one of the standard General Service Agreements (i.e. the General Services Agreement, the Information Technology and Management Consulting Professional Services Agreement, and the Financial Review and Assurance Services Agreement); (ii) another form of contract template as approved by [Legal Services Branch](#); or (iii) identification of a number of government standard clauses that will be included in any subsequent custom contract that is developed with input from Legal Services Branch.

Ministries are instructed to select the one option that best meets their requirements and delete the other two options from the document.

When should Option 1 be used?

Use option 1 if one of the [General Service Agreements](#) (GSA) will be used as the resulting contract format. The RFP drafter will select option 1 and delete options 2 and 3 from the template.

To ensure proponents understand and accept the terms of the contract by which they will be bound, if successful, identify which GSA template applies and delete those that do not. Information as to which GSA to use can be found on the [General Service Agreement Information](#) on the BC Bid Resources website.

Be sure to identify which schedules apply to the contract format. Schedules A and B will always apply, but other schedules will depend on the services being procured.

Schedule C will apply unless the RFP expressly does not allow subcontracting. If unsure what insurances may be required for Schedule D, contact the [ministry's procurement specialist](#) or [Risk Management Branch and Government Security Office](#), Ministry of Finance to discuss additional insurances that may be required (which should be included as an appendix to the RFP), or to determine if insurance can be waived all together. Schedule E will be required if the contract involves the collection and/or use of personal information. Schedule F will apply if additional terms, as approved by the Legal Services Branch, apply to this contract, and they should be attached as an appendix to the RFP. Schedule G will apply if the services are of a nature that the described security measures are needed.

If any of the GSA schedules do not apply to this contract, indicate this in the RFP.

When should
Option 2 be
used?

If the successful proponent will be entering into any other format of contract template (e.g. a Shared Cost Arrangement which may also be known as a Transfer Under Agreement, or a customized contract that has been approved by [Legal Services](#)) retain the wording for option 2 and delete the wording and instructions for options 1 and 3.

If using option 2, the RFP formatting may be affected if the contract template is embedded within the RFP document. Therefore, the contract document should be attached on BC Bid with the RFP as a separate electronic file.

When should
Option 3 be
used?

The third option does not require that a contract format be included with the RFP but it does require the author of the RFP to identify all key contract terms and conditions that will be included in the contract that is finalized with the successful proponent. The eventual contract will include negotiated terms and conditions as well as those identified in the RFP document. However, although Option 3 provides for negotiated terms and conditions in the contract, there can be no substantial or material changes made to the proposal which forms the basis for the contract or to the terms and conditions set out in the RFP.

Ministries need to contact [Legal Services Branch](#) for the contract terms and conditions to include in their specific RFP. Do not insert contract clauses used in prior RFP documents without this legal review.

Remember to plan for additional time between notifying the successful proponent and signing the contract, as it may take some time to come to agreement on the full contract terms and conditions.

If this is the contracting option that is chosen in the RFP, options 1 and 2 will be deleted from the template and the wording for option 3 will be finalized with Legal Services and included in the RFP document.

4.10 Additional Appendices

Can other appendices be attached to the RFP?

Yes. Ministries can attach as many additional appendices as needed in order to provide a complete picture of the RFP requirements. Examples include forms that proponents fill out to demonstrate how they meet the benchmarks identified in section 5 of the RFP, manuals, standards, reporting formats, drawings, system architecture descriptions, blueprints, reports, etc.

If including appendices, be sure to reference them in the body of the RFP to give proponents a clear picture of how they fit into the overall process.

What if an appendix is a large file?

If any of these additional appendices are large electronic files, consider making them accessible through another website and inserting the URL into the RFP appendix. Proponents may have difficulties uploading large electronic files.

What if the appendix contains confidential information?

Remember that BC Bid is a public website. If proponents require confidential information in order to fully understand the RFP requirements and benchmarks, do not post this information on BC Bid. Instead, ministries can request proponents to sign a non-disclosure agreement before access to the confidential information will be provided. Such access would be outside of the BC Bid website (e.g. a password for another site, or emailed directly to the proponent).

What happened to the Receipt Confirmation Form that used to be part of the RFP template?

Every RFP document must include information on the process for advising proponents on any changes made to the RFP prior to the closing date and time. The BC Bid website used to be limited on how many files could be uploaded with a single RFP, and therefore a Receipt Confirmation Form was required to allow the Province to send updates directly to those proponents indicating their interest.

Now, however, the BC Bid website has a much larger capacity for attaching files to a single RFP. Ministries can now simply post as many addenda as are needed on BC Bid with the RFP, and responsibility for checking the website for such addenda rests with the proponents (see section 2.4 of the RFP template).

If BC Bid is not being used because the overall contract value is under \$75,000 or the opportunity is restricted to a qualified supplier list), section 2.4 has suggested alternate wording that can be used. This language ensures that the responsibility for providing up-to-date contact information rests with the proponent.

For these reasons, the Receipt Confirmation Form has been deleted from the template. However, if a Proponents' Meeting is planned, ministries may want to create a similar form for proponents to pre-register or indicate their interest in attending.

5 IDENTIFYING AND ADVERTISING TO POTENTIAL PROPONENTS

How many firms / individuals should be invited to submit a proposal?

Most RFPs will want to attract a wide audience in order to increase competition and so will be posted to BC Bid to attract the interest of a wide variety of vendors.

Note that policy does not allow ministries to restrict an opportunity for services valued at \$75,000 or more, unless a pre-qualification list applies (see Core Policy [6.3.2.c.4](#)). Refer to [Request for Qualifications](#) for more information.

How will interested proponents find the RFP?

One of the best ways to attract interest in an RFP is to post it on BC Bid and allow interested parties to download the RFP document. BC Bid is very effective for two reasons: the business community relies on the Internet as the place to search for new contract opportunities, and BC Bid provides ministries with free advertising and document distribution.

Can the RFP be advertised in the newspaper?

Yes. Advertising can be used as a supplement to BC Bid (posting on BC Bid is required by core policy for contract opportunities valued at over \$75,000 for services or over \$10,000 for goods), or as an alternative to BC Bid for contract opportunities under the policy thresholds.

Advertising does not have the cost advantages of BC Bid but can be desirable if a certain level of visibility, either province-wide or within a certain professional or geographic community, is desired. Such advertisements should briefly explain what goods and/or services are being sought, the name and number of the opportunity, and how to obtain the full RFP documentation (usually the BC Bid website address). Note that all advertising will require the pre-approval of the ministry's communication department or Government Communications and Public Engagement.

Refer to the information under Effective Marketing for [Strategies to Receive Quality Submissions](#) for more information.

Can proposals be accepted from firms other than those invited?

Yes, provided that the opportunity was not limited to qualified suppliers only and the proposals are delivered in the specified format before the closing date and time.

How long should the RFP be open?

The length of time that the RFP should be posted varies, depending on the complexity of the requirement and the time of year. Typically, the time from which an RFP is posted to when it's closed should be no less than four weeks. Refer to [Sufficient Time Posting Guidelines](#) for more information.

6 ENSURING THE INTEGRITY OF THE REQUEST FOR PROPOSALS PROCESS

[Government policy](#) (Policy 6.3.2.a.7) requires that all proponents be provided with identical information on which they can base their proposals. Ministries should identify one contact person and require that while the Request for Proposals (RFP) is open, all communication with the ministry be in writing and through that person. A consistent contact person for an RFP enhances the safekeeping of the process by ensuring that the information provided to any one proponent in response to a question is fairly shared with all interested proponents.

More information about ensuring the integrity of the RFP process can be found in [Strategies to Receive Quality Submissions](#).

What tasks should be assigned to the contact person on an RFP?

The contact person will receive questions, obtain answers, and post or issue amendments as necessary. All contact with proponents during the RFP process (i.e., questions and answers) should be formal and documented in writing. Refer to Answering Vendor Questions under the [Strategies to Receive Quality Submissions](#) for more information.

The contact person may be given other responsibilities, such as evaluating proposals, ensuring complete documentation for the RFP, receiving proposals, etc.

Can proponents ask questions about the RFP document?

Yes. Proponents may request clarification of or changes to anything contained within the RFP. This may include terms and conditions contained in the RFP, the evaluation criteria, or additional explanations about the specific ministry requirements. Refer to Answering Vendor Questions under the [Strategies to Receive Quality Submissions](#) for more information.

Can RFPs change after they have been released?

Yes. The standard terms and conditions for a government RFP provide the Province with the right to modify the terms of an RFP at any time prior to closing, and the right to cancel an RFP at any time prior to entering a contract with the successful proponent. Refer to Answering Vendor Questions under the [Strategies to Receive Quality Submissions](#) for more information.

No changes to the procurement process, as stated in the terms of the RFP, should be made after closing. If changes to the RFP document are necessary after closing, ministries are to obtain advice from their [ministry procurement specialist](#) and/or [Legal Services Branch](#) to ensure that a change will not result in any unfair treatment or prejudice to any proponent or significantly affect a proponent.

How are changes to the RFP communicated?

Any changes to the requirements or terms of an RFP are to be communicated as specified in the RFP document. If the RFP was posted on BC Bid (as most are), any amendments should be posted as addenda on BC Bid with the RFP. Interested proponents are responsible to check the BC Bid website on a regular basis to look for updates, or they can subscribe to [BC Bid](#) and set up a profile to ensure they are automatically notified of any RFPs, and addenda to RFPs, that match their profile.

If the RFP was not posted on BC Bid (i.e. is under \$75,000 or is limited to pre-qualified suppliers), send any amendments using the proponents' contact information that the ministry used to invite the proponents, or updated contact information as provided by the proponent.

Can the successful proponent back out if their plans change?

No. If a successful proponent chooses to withdraw their successful proposal, they are considered to be in breach of contract (i.e., in breach of Contract A). Submission of the proposal was an offer to the Province and acceptance of the successful proposal on the part of the Province results in a legal contract.

If a proponent states their intention to back out after they have been told that they are the highest scoring proponent, contact the [ministry's procurement specialist](#), [Procurement Services Branch](#) and/or [Legal Services](#) for advice on next steps.

What are the ministry's responsibilities for accepting and storing proposals?

Refer to the section 8 of this guide for information on how to manage the receipt and storage of proposals in a manner that addresses risks.

7 THE PROPONENTS' MEETING

What is a Proponents' Meeting?

A Proponents' Meeting is intended to provide proponents with an opportunity to ask questions, gather additional information, or express concerns related to a specific Request for Proposals (RFP). For example, proponents may:

- seek clarification on anything that is unclear in the RFP document;
- ask whether the service was contracted previously or performed in-house;
- ask whether there is a budget for the project (if the RFP did not include a budget amount); or
- ask about the ministry's anticipated time frame for awarding the contract, as well as the anticipated time frame for completing the project.

The meeting is hosted by government, usually in the place where the work is to be performed. Minutes or a transcript of the meeting are taken and are made available to all interested proponents, including those who were unable to attend.

More information on Proponents' Meetings can be found under Answering Vendor Questions section of [Strategies to Receive Quality Submissions](#).

Is a Proponents' Meeting always required?

No. Ministries can choose whether or not to include a Proponents' Meeting in their RFP process. More information can be found under Answering Vendor Questions section of [Strategies to Receive Quality Submissions](#).

Can vendors attend a Proponents' Meeting by phone?

Proponents' Meetings usually work best as a face-to-face meeting. However, if some interested vendors may be located at a considerable distance from the meeting location, ministries may schedule this meeting with an option to join either in person or via teleconference.

If allowing teleconferencing in the Proponents' Meeting, consider the following:

- The equipment being used needs to be adequate for the purpose (i.e. sufficient lines available for all interested vendors to phone, clear audio);
- Not providing the teleconference information in the document, but rather directing interested vendors to ask for this information in order to create a record of who joined via teleconference;
- Designating someone as the moderator for the teleconference line to ensure any technical issues are quickly addressed; and
- Pausing regularly to give an opportunity for those on the phone to participate.

When should the Proponents' Meeting be scheduled?

A Proponents' Meeting will usually be held a week or two after the RFP is issued, and at least two weeks before the closing date, in the place where the work is to be performed. The date and time of the meeting should appear prominently in the RFP document. If it is a major requirement or one where work might be done at a number of sites, ministries may conduct a series of meetings in different locations

throughout the Province. To manage costs and time, ministries may consider allowing a Proponents' Meeting to be conducted by teleconference for those participants unable to travel.

How should the Proponents' Meeting be conducted?

Copies of the RFP document should be made available at the Proponents' Meeting. The introduction to the meeting should be brief. Although most of the attendees will have read the RFP, it may be beneficial to step through each section (particularly if the RFP requirements are complex), pausing between each to invite questions. Some proponents benefit from this approach, as they may not have focused on the entire RFP document prior to the meeting and therefore may ask questions they wouldn't otherwise have asked. Questions should be encouraged at a Proponents' Meeting as they are the opportunity to ensure that the ministry and proponents have a shared understanding of the requirements while there is still time to make edits and clarifications to the RFP through addenda.

Generally, proponents are not asked to introduce themselves at the meeting but an attendance sheet should be circulated to record who was there.

Is attendance at a Proponents' Meeting mandatory?

A proponent's attendance at the meeting should be optional unless the meeting incorporates a site visit to illustrate conditions that could not be described adequately in the RFP. If attendance at the Proponents' Meeting is mandatory, this must be expressly stated in the RFP.

If the Proponents' Meeting is mandatory, an attendance sheet that identifies each proponent organization with a sign-in component is required. This sheet will serve as proof of meeting this mandatory requirement.

When deciding whether or not to make the Proponents' Meeting mandatory, consider the consequences if only one proponent attends.

Is it necessary to record the Proponents' Meeting?

Yes. Minutes or preferably a verbatim transcript of the Proponents' Meeting should be created. This record of questions asked and responses given should be made available to all proponents as an addendum to the RFP document. The ministry may record the minutes themselves or arrange for verbatim [recording and transcription services](#) available through the Goods and Services Catalogue.

How should questions be raised and answered at a Proponents' Meeting?

The RFP will usually ask proponents to submit complex questions or those requiring anonymity in writing in advance of the meeting, which will give the ministry time to prepare a thorough answer. At the meeting, these questions and answers are read out and further questions are invited from the floor.

When walking through the RFP, proponents will likely ask questions relevant to each section. Leave time at the end for any additional questions that may have occurred to proponents – remember that the objective is to encourage questions and to answer as many as possible. However, questions that cannot be answered immediately can be deferred and then answered in writing after the meeting,

either with the Proponents' Meeting transcript or minutes or in a subsequent addendum.

Who should attend from the ministry?

The contact person from the RFP should be at the meeting to reinforce his or her role as the official "gatekeeper" of RFP information that can be relied upon. The meeting can be chaired by a ministry employee or a PSB representative acting on the ministry's behalf.

Others from the ministry should include those who understand the requirements well, and therefore are in a position to answer questions related to the program or services. In addition, at least one person should attend who understands the procurement process well and who can answer related questions.

Should an agenda be prepared?

Yes. It is a good idea to provide a meeting agenda. The following is an example of a typical agenda.

Location:	Ministry board room	
Date and Time:	April 1, 20xx at 10:30 a.m.	
Time	Topic	Responsibility
10:30 a.m.	Welcome of Proponents Explain meeting process and purpose Introduction of Ministry representatives	Chair
10:35 a.m.	Review Agenda Housekeeping Administrative requirements	Chair
10:40 a.m.	Ministry Statement	Ministry Representative
10:45 a.m.	Questions received prior to Proponents' Meetings (if applicable)	Chair
10:55 a.m.	Review of RFP	Chair
11:25 a.m.	Questions from the floor	Program Manager / Other Ministry Staff as necessary
11:50 a.m.	Final reminders Closing of meeting	Chair

Example 2 Proponents' Meeting Agenda

8 RECEIVING PROPOSALS

What is important to know about receiving proposals?

The delivery requirements must be clearly set out in the RFP. The Ministry must assign someone with the responsibility for handling proposals received before closing time. More information on this process can be found in the [Step-by-Step Guide on How to Evaluate Submissions](#).

The integrity of the process relies on ensuring that there is no uncertainty as to when a proposal is received.

Is it necessary for every proponent to sign their proposal?

Yes. Section 2.2 of the RFP requires that a proponent, or the authorized representative of a proponent, sign the proposal to confirm the proponent's intent to be bound to its proposal and to the terms and conditions of the RFP. For Proponents who submit proposals via e-Bidding (where electronic submissions through BC Bid are permitted), the attachment of the proponent's e-bidding key is effective as a signature. For proponents who submit proposals in hard copy or via e-mail, they have the option of completing and signing the "Confirmation of Proponent's Intent to be Bound" from the RFP cover page or they can provide their signature in some other format in their proposal, provided that the proponent (and where applicable, the authorized representative of the proponent) is clearly identified. Signatures may be hand-written originals or scanned copies of originals.

Can proponents submit their proposal by fax or e-mail?

The RFP template provides for three different submission options: hard copy delivery by hand or by courier, delivery through the e-bid process on BC Bid, or delivery by email (new). The RFP writer can choose which option(s) best suit the particular opportunity. If the RFP provides for more than one submission option, proponents can choose which option works best for them.

Faxed submissions are not recommended due to the risks with transmission and the fact that fax machines are in less common use. For that reason, the RFP template does not provide for fax delivery. If a ministry wishes to accept proposals by fax, it will be important to modify the mandatory language in the RFP regarding how proposals are to be delivered, which must be approved by the [Legal Services Branch](#). The RFP should be crystal clear on the proponent's responsibility for completeness of the transmission, and the ministry will require clear and consistent procedures to confirm when proposals are received.

Although email is a commonly used form of communication, and for that reason, the new RFP template provides for the option of accepting emailed submissions, there are risks that the RFP writer should carefully consider before selecting this option. Refer to [Accepting Emailed Submissions](#) for more information on what can go wrong with emailed submissions. If allowing emailed proposals, at least one other option should also be permitted.

If electronic submissions are desired, the e-Bidding function on BC Bid is both convenient and does not have the same risks associated with emailed or faxed submissions. There is no danger of a busy signal, and all proponents receive a confirmation email once their proposal is successfully sent. If this email is not received, proponents can contact the BC Bid Help Desk during normal business hours for assistance. For more information on the functions available through BC Bid, contact the [Procurement Services Branch](#) (PSB).

How important are the noted closing date and time?

The closing date and time are of critical importance, as arrival before the closing date and time is a mandatory requirement of the Province's corporate RFP template, meaning that proposals received on or after that time cannot be considered. Instead, they should be returned, unopened, to the proponent. This requirement ensures the fairness of the process as all interested proponents are held to the same standard.

Refer to the [Step-by-Step Guide on How to Evaluate Submissions](#) for more information on the importance of ensuring that all mandatory requirements are met.

If the ministry has contracted with a proponent before, do they still need to describe their relevant experience in detail?

Yes. The evaluation process may consider only information that is included in the proposal. Therefore, all proponents must fully respond to the requirements of the RFP, regardless of their previous history with a ministry. Evaluators cannot use any information that they may know about a proponent that is not disclosed in the proposal.

Refer to the [Step-by-Step Guide on How to Evaluate Submissions](#) for more information on what to evaluate.

9 EVALUATION OF PROPOSALS

How are proposals evaluated?

An evaluation team is established as part of the Request for Proposals (RFP) process. This team is responsible for evaluating all proposals against the evaluation criteria included in the RFP document and its evaluation handbook.

Who should be on the evaluation team and what is their role?

[Government policy](#) (Policy 6.3.3.b.3) states that ministry staff must be part of the evaluation team. The team may be a combination of ministry staff and contractors but it may not be fully contracted out.

Refer to [Evaluation Teams](#) for more information about who should be on the team, and the team's responsibilities in the RFP process.

What should be done about real or potential conflicts of interest?

Refer to [Standards of Conduct and Relationships with Contractors](#) and [Evaluation Teams](#) for more information on conflicts of interest and bias that may impact the proposal evaluation process.

When should the evaluation team meet?

Ideally, the evaluation team should be involved with the development of the RFP and its corresponding evaluation handbook. If this is not possible, the entire team should meet just prior to the RFP closing. This will provide an opportunity to step through the evaluation criteria, to explain how the process works, and to answer any questions that may arise. It will also give an opportunity to make changes to the handbook that will add clarity to the process, provided those changes are consistent with the RFP.

Once the RFP closes, the evaluation team should schedule their consensus evaluation meeting on a date that allows all team members time for their individual evaluations of all proposals beforehand. Refer to the [Step-by-Step Guide on How to Evaluate Submissions](#) for more information.

How much of the evaluation process should be documented?

All RFPs will require a corresponding evaluation handbook that is used to document the evaluation team's findings. Both the individual evaluations and the final team evaluations should be well documented and retained for the procurement file. Refer to the [Step-by-Step Guide on How to Evaluate Submissions](#) for more information.

The evaluation handbook should include both the positive and negative comments on what was found that support the scores given for each criterion. These comments should be fact-based rather than opinions, referencing the information contained in the proposal only.

The completed final evaluation handbook should contain sufficient detail to support the decisions made, and to provide the information needed for any

[debrief](#) meetings. It will also be handy to reference during the contract finalization stage, as the ministry may need clarification on those aspects of the proposed approach that did not score well due to vague responses.

How should proposals be evaluated against the mandatory criteria?

After the RFP closes, check each proposal for compliance with the mandatory criteria. This step can be performed by the evaluation team or it can be done by either a PSB representative or the team chair. This must be done before the full team evaluates proposals. Evaluating the mandatory criteria involves assessing whether the proposal meets or does not meet each mandatory criterion. Any proposal not fully meeting all mandatory criteria must be rejected without further consideration, and the rationale for rejection must be documented in the evaluation handbook.

Refer to the [Step-by-Step Guide on How to Evaluate Submissions](#) for more information.

How should proposals be evaluated against the weighted criteria?

Proposals that meet all mandatory requirements are then assessed against the stated weighted criteria set out in the RFP and as defined in the evaluation handbook. This assessment includes both the individual evaluations of proposals, where each team member scores and comments on each proposal independently of the other team members, and the final team evaluation. There are two main methodologies that can be used to finalize the scoring and comments on the weighted criteria:

1. the proponent's response and the team's individual assessment of each criterion are discussed and team members come to consensus agreement on the score and comments (see the [Step-by-Step Guide on How to Evaluate Submissions](#) for more information); or
2. the individual team member's scores of each proposal are averaged, and all comments are incorporated in the final evaluation handbook.

The team can decide which method would work better. No matter which approach is used, proposals must be compared to the stated evaluation criteria.

Refer to the [Step-by-Step Guide on How to Evaluate Submissions](#) for more information.

Is the same evaluation methodology used for price?

No. Price should be evaluated in accordance with how the RFP document described this process (refer to section 4.6.4 of this guide for detailed information on the options available).

If price will be evaluated as a mathematical formula, two of the evaluators can manage this process rather than the entire team. The two evaluators should calculate the score for price independent of each other; if the scores for each proposal match, this can then be considered the final pricing score. However, if the scores do not match, even for only one proposal, the two team members should discover why and correct the problem.

Keep in mind that the evaluation of price should only include those proposals that have met all mandatory requirements and minimum scores. The proposal that is the lowest price initially may not meet both of these requirements, and therefore a different proposal price would be used as the lowest price for evaluation purposes if using a mathematical formula.

Can the evaluation process be changed after posting the RFP?

If the RFP has not yet closed, how the weighted criteria (including price) will be evaluated can be changed. However, this would need to be disclosed in an addendum, with clear language that the new process replaces the one described in the original RFP. Such changes should only be made if new information comes to light after posting the RFP that has a significant impact on how proposals should be evaluated.

Once the RFP has closed, do not change any of the evaluation methodology described in the RFP. The integrity of process depends on doing what was described in the RFP document and any addenda.

How is the evaluation handbook developed?

The evaluation handbook should be developed using the mandatory and weighted criteria disclosed in the RFP. Refer to the [Step-by-Step Guide on How to Evaluate Submissions](#) and to section 4.6.2 of this guide for more information.

The handbook will need to identify what each Response Guideline is worth (i.e. its weight) from the total points available for the applicable section. For example, if the RFP had five Response Guidelines in the Capabilities section which was overall worth 30 points, these points would be divided amongst the five Response Guidelines. Points may be divided evenly ($30/5=6$ points each), or some Response Guidelines may be worth more and some less depending on their relevant importance. However, if points are not evenly distributed over the Response Guidelines, the RFP should advise proponents not to assume equal weighting, and overall the points in the evaluation handbook must equal the overall points identified for the section in the RFP.

Price will be evaluated using the process described in the RFP, which is usually a mathematical formula (refer to section 4.6.4 of this guide for detailed information).

The handbook requires space for evaluator comments to support the scores given.

If a single Response Guideline addresses a lot of information, the evaluation handbook may have multiple sub-sections to address it. Each of these sub-sections would have its own evaluation criteria and would be assigned its own points. For example, if the RFP has a Response Guideline that says "Complete Appendix C", the evaluation handbook may divide this Response Guideline into one sub-section for each part of the appendix.

Alternately, if two Response Guidelines are closely related, the handbook could have both under one section to be evaluated together.

There are many options to the design of the evaluation handbook, provided that it remains consistent with the RFP and its addenda. Those new to creating evaluation handbooks should contact their [ministry procurement specialist](#) or the [Procurement Services Branch](#) for assistance.

How should scoring work?

There are many options to developing a scoring methodology or grid. Example 3 is a matrix that illustrates a scoring guide for criteria other than price.

Remember that this example represents the score that would be multiplied by the weight for each Response Guideline in order to determine the weighted score for each proposal. For example, if a Response Guideline is worth 5 points and a proposal just meets the benchmarks identified in the RFP, the weighted score would be $5 \times 0.6 = 3$ points, using the grid below.

Quality of response	Multiply weight by this factor
Excellent; meets all of the requirements (100%)	1
A sound response; fully meets most of the requirements (80%)	0.8
Acceptable response; meets the basic requirements described in the RFP (60%)	0.6
Falls short of meeting or arguably meets the basic requirements described in the RFP (40%)	0.4
Addresses something of the basic requirements described in the RFP, but only at a very minimal level (20%)	0.2
The response is completely unacceptable or the information is missing altogether (0%)	0

Example 3 Assignment of Points

Remember to document the rationale for each score given in the evaluation handbook, in sufficient detail to support the score to the proponent in a debrief.

When should references be checked?

The timing of reference checks and the approach to checking references will be dictated by the RFP document. Reference checks could take place once a successful proponent is identified or as part of a shortlist process.

How can references affect who is successful?

References should be scored as a pass/fail rather than having points assigned to them (see [Using References](#) for more information). If a ministry is considering using a method other than pass/fail on references, the ministry should consult with the [Procurement Services Branch](#) and [Legal Services Branch](#) for advice..

If using a pass/fail approach for references, only the references for the highest scoring proponent need to be checked. If the references for the highest-scoring

proponent are satisfactory (i.e. they “pass”), no further reference checks are required. If the references are not satisfactory, consult with [Legal Services](#) to determine if they are a “pass” or a “fail”. If Legal Services concurs that the references have failed, document the rationale well and repeat the process with the next highest-scoring proposal.

In all cases, references must be checked and used as described in the RFP and any addenda that addressed references; do not deviate from this process.

Does the evaluation always identify a successful proposal?

[Government policy](#) (Policy 6.3.3.b.6) states that the contract must be awarded to the proposal that meets all mandatory criteria and achieves the highest rating against the desirable criteria. In addition, all minimum scores must be met, if any were identified in the RFP. If none of the proposals received met the mandatory criteria and minimum scores (if applicable), there will be no successful proponent. However, the evaluation process will normally identify a successful proposal unless the Province decides to cancel the RFP process.

At the end of the evaluation process, all evaluation team members should sign the bottom of the final evaluation documentation or a summary spreadsheet to indicate their agreement with the conclusions.

How should the evaluation of proposals be documented?

Use the evaluation handbook to document proposal evaluations. The completed handbooks should include scores and comments that support all decisions made.

A summary of the evaluation handbook can also be created, for ease of reference in how each proponent scored against the established weightings. Such summaries must be consistent with the full evaluation documentation agreed upon by all evaluation team members. Following is an example of a summary:

	Weighting	Available Points	Minimum Score	Proponent A	Proponent B
Mandatory Criteria	0%	0			
Submitted before the closing date and time		Yes/No			
Signed proposal		Yes/No			
Key Personnel has current PMI Certification		Yes/No			
Weighted Criteria	100%	200			
Capabilities	40%	80			
Organizational Experience		50			
Key Personnel Experience		30			
Approach	25%	50	30		
Implementation Plan		30			
Quality Control Processes		15			
Transition Plan		5			
Pricing	35%	70	n/a		
Lowest Price/This Price x Points Available					
TOTALS	100%	200			

Example 4 Sample Scoring Summary for Proposals

10 NOTIFYING PROPONENTS OF THE DECISION

Should all proponents be notified of the result?

[Government policy](#) (Policy 6.3.3.c.1) requires that written confirmation of the evaluation process results be sent to the successful proponent, and that unsuccessful proponents be notified and offered the opportunity for a debriefing on their proposal. Refer to [Announcing Results](#) for more information.

Results should be announced to successful proponents first. Example 5 illustrates the wording that is recommended for notifying the successful proponent in a Request for Proposals (RFP) process.

[Successful Proponent Name]

Re: Request for Proposals [Name and RFP Number]

Thank you for your response to the above Request for Proposals. The Ministry of [Ministry Name] has completed its evaluation process and has determined that you are the highest scoring proponent in the above mentioned RFP.

Subject to finalization and execution of a written contract, you will commence with the requirements of the RFP. The Ministry will be contacting you to schedule dates for contract finalization proceedings.

Sincerely,

Example 5 Letter to Successful Proponent

Example 6 illustrates the recommended wording for notifying unsuccessful proponents once the contract has been signed with the successful proponent.

[Proponent Name]

Re: Request for Proposals [Name and RFP Number]

Thank you for your response to the above Request for Proposals (RFP). Your proposal was carefully evaluated using the evaluation criteria and weighting system set out in the RFP. The Ministry of [Ministry Name] completed their evaluation process, determined that [Successful Proponent Name] was the highest scoring proponent. A contract has been finalized with [Successful Proponent Name].

Again, thank you for your interest in this project. We appreciate the effort you and your colleagues put into your submission. It is anticipated that debriefings (private meetings to discuss the strengths and weaknesses of unsuccessful proposals) will be held in [city name]. If you are interested in a debriefing session with respect to your proposal, please advise me in writing, by facsimile to [fax number] or e-mail to [e-mail address], no later than [date]. If

you would prefer a telephone debriefing, indicate this in your fax or e-mail. Please reference the RFP number on your request.

Sincerely,

Example 6 Letter to Unsuccessful Proponents: Contract Finalized

Example 7 illustrates the recommended wording for notifying unsuccessful proponents if the decision has been made to announce before the contract has been signed with the successful proponent. Refer to [Announcing Results](#) for more information on the circumstances where this approach is recommended.

[Proponent Name]

Re: Request for Proposals [Name and RFP Number]

Thank you for your response to the above Request for Proposals (RFP). Your proposal was carefully evaluated using the evaluation criteria and weighting system set out in the RFP. The Ministry of [Ministry Name] has now completed their evaluation process and has determined that [Leading Proponent Name] is the highest scoring proponent.

Subject to finalization and execution of a written contract, [Leading Proponent Name] will commence with the requirements of the RFP.

Please note that all proposal responses remain valid for acceptance for the 90 day period stated in the original RFP document. If a contract with the highest scoring proponent cannot be finalized, the Ministry may exercise its option to finalize a contract with the next highest scoring proponent within this time frame.

Again, thank you for your interest in this project. We appreciate the effort you and your colleagues put into your submission. It is anticipated that debriefings (private meetings to discuss the strengths and weaknesses of unsuccessful proposals) will be held in [city name]. If you are interested in a debriefing session with respect to your proposal, please advise me in writing, by facsimile to [fax number] or e-mail to [e-mail address], no later than [date]. If you would prefer a telephone debriefing, indicate this in your fax or e-mail. Please reference the RFP number on your request.

Sincerely,

Example 7 Letter to Unsuccessful Proponents: Contract Pending

If the unsuccessful proponent missed a minimum score, they would not be eligible for consideration even if a contract was not finalized with the highest scoring proponent. In this case, consider deleting the paragraph that relates to proposals remaining valid for 90 days.

What if a proponent missed a mandatory requirement?

If a proponent misses a mandatory requirement, the announcement letter should address what was missed and state that the proposal was not evaluated. Since the proposal was not evaluated and therefore additional information is not available, offering a debrief is not appropriate. Example 8 shows how such a letter could be worded; it should be edited to reflect the specific mandatory that was missed.

[Proponent Name]

Re: Request for Proposals [Name and RFP Number]

Thank you for your response to the above Request for Proposals (RFP). The Ministry of [Ministry Name] has now completed their evaluation process and has determined that [Leading Proponent Name] is the highest scoring proponent.

Subject to finalization and execution of a written contract, [Leading Proponent Name] will commence with the requirements of the RFP.

Your proposal was not evaluated as it missed a mandatory requirement. Section 7.1 of the RFP, item [x] states “[copy and paste the missed mandatory; e.g.: The proposal must either (1) include a copy of the cover page that is signed by an authorized representative of the Proponent or (2) otherwise identify the RFP, identify the Proponent and include the signature of an authorized representative of the Proponent that confirms the Proponent’s intent to be bound, or (3) be submitted by using the e-bidding key on BC Bid (if applicable) in accordance with the requirements set out in Section 2.2]”. [State what was found in the proposal that demonstrates non-compliance with the mandatory; e.g.: Your hard copy proposal contained no signature, and therefore failed this mandatory requirement and could not be considered.]

Should you have any questions about this decision, feel free to e-mail me at [e-mail address],

Sincerely,

Example 8 Letter to Unsuccessful Proponents: Missed Mandatory

11 THE CONTRACT

When will a contract need to be finalized?

Ideally, the approach proposed from the successful proposal and the Contractor Requirements identified in the RFP can be written into the government contract form that was attached to the Request for Proposals (RFP) document and the proponent will readily sign it. This is the case for some procurements, but not all.

The Contract A and B obligations that are inherent in the RFP process for the corporate RFP template do not allow for material changes between the successful proposal and the final signed contract. Therefore, the contract that results from the RFP is not so much negotiated as finalized, with minor edits for clarity and additional detail that do not change the substance of what was proposed.

If the best proposal would be unacceptable without significant change, the ministry should consider the option of announcing that the RFP process has concluded and no suitable proposal was received.

Refer to [Contract Finalization](#) for more information.

An important consideration in the contract finalization stage is ensuring the rules of the process do not change, as this would be unfair to the other proponents. The contract cannot change the requirement so much that the other proponents could reasonably claim they would have submitted a different proposal had they known this was what the ministry really wanted. And no matter how tempting, ideas from an unsuccessful proposal cannot be incorporated into the contract with the successful proponent.

How should the ministry plan for contract finalization?

Preparing for contract finalization is of vital importance, and the [ministry's procurement specialist](#), [Procurement Services Branch](#) (PSB) or [Legal Services Branch](#) is available to help ministries develop a strategy.

In planning for contract finalization, ministries may want to:

- Supplement the general industry information that was gathered in the planning stage of the RFP with information specific to the successful proponent. It may be useful to have some awareness of the proponent's other major clients and the current trends in the industry.
- Review the evaluation document on the successful proponent's approach or methodology, specifically identifying those areas where additional detail is required for the contract.
- Provide the successful proponent with an initial draft of the contract in advance of the first meeting. This draft should include all relevant information from the RFP and their proposal, as well as the ministry's comments on those areas where clarification or additional detail is required.

- Anticipate the proponent's position(s), identifying and considering as many options as possible.
- Take time to consider the best and worst alternative to an agreement with the proponent. If a ministry is in the position of absolutely requiring a contract, it will be at a disadvantage.
- Consider the proponent's best and worst alternatives in coming to an agreement with the ministry.
- Confirm the extent of authority vested in the individual responsible for finalizing the contract on the proponent's behalf and the individual responsible for finalizing the contract on the Province's behalf, including the authority to approve the contract or to withdraw without a signed contract.

As ministries participate in the contract finalization process, they should:

- plan to take a collaborative approach;
- be aware that they are working on a long term relationship in the name of the Province that should satisfy both parties;
- avoid being defensive or aggressive and give the other party plenty of opportunity to speak;
- take time to consider all information presented;
- keep the process focused on issues or interests rather than positions or personalities;
- identify and build on areas of common interest;
- clearly document and confirm areas of agreement so they do not get revisited later; and
- be willing to leave the table to conduct research as necessary. For example, if a proponent states that everyone else in government is getting the same deal, the ministry will want to confirm this fact before signing a contract.

The RFP template contains boilerplate language whereby all proponents agree to the terms and conditions of the RFP as well as its appendices and addenda (see section 2.2 of the RFP template). If the successful proponent wants to change any of these terms and conditions, the ministry should remind them of this language in the RFP. Before agreeing to any changes, the ministry should first consult with [Legal Services](#) to ensure such a change does not create any additional significant risks.

How much detail should be included in the final contract?

Whatever is agreed between the successful proponent and the Province must be included in the contract and must be clearly and explicitly written. For example, if the proponent has agreed to assign certain staff to the contract, and the ministry wants these to be the ones who do the actual work, the contract should identify

them by name.

Deliverables should be clear and written with the acronym SMART in mind – that is, Specific, Measurable, Attainable, Results-bound, and Timely. This approach will help avoid misunderstandings about what is expected in the contract, as well as disagreements about whether or not the contractual obligations were met.

Whenever possible, avoid the use of interim agreements, such as Letters of Intent or Memoranda of Understanding. Ideally, the only written agreement will be the final contract.

Can ideas from an unsuccessful proposal be incorporated into the final contract?

No. Ministries should not share information from one proposal with another proponent or incorporate an idea from one proposal into the final contract with another proponent.

Are there standard contract forms to use?

Yes. [Government policy](#) (Policy 6.3.3.e.4) specifies that one of the three approved [General Service Agreements](#) (i.e. the General Services Agreement, the Information Technology and Management Consulting Professional Services Agreement, or the Financial Review and Assurance Services Agreement) should be used in all instances except:

- any contract with a value greater than \$250,000, unless use of the template for the contract has been approved by the ministry's legal counsel;
- contracts for office assistance services or with employment agencies where a Corporate Supply Arrangement (CSA) exists;
- vehicle and equipment rentals;
- contracts for third party service delivery (e.g., Shared Cost Arrangements);
- capital construction projects;
- goods acquisitions, unless ancillary to services under the contract and advice has been obtained from the ministry's legal counsel about additional provisions that may be appropriate; or
- software licensing.

Refer to the [General Service Agreement Information](#) for more on which version is appropriate for a specific contract.

Can changes be made to the General Service Agreement?

No changes may be made to the terms and conditions in the [General Service Agreement](#) without review by [Legal Services Branch](#).

The [General Service Agreement](#) is designed for a wide variety of contracts for services valued up to \$250,000. This contract form includes the government's terms and conditions related to insurance, indemnities, and rights to intellectual property. It also includes schedules, some of which will be completed as part of contract finalization (e.g. Schedule A Services, Schedule B Fees and Expenses, Schedule C Sub-contractors), while others are pre-determined in the RFP contract format (e.g. Schedule D Insurance, Schedule E Privacy Protection, and Schedule G Security). The template contains information to assist in completing these schedules.

If the General Service Agreement is not appropriate, a ministry may develop an alternative contract, which Legal Services must approve. The [Risk Management Branch and Government Security Office](#) must also approve the indemnity clause in any alternative form of contract where the Province indemnifies the contractor.

Can the Province sign the contractor's form?

If the RFP included the specific contract format or particular terms and conditions that would be included in the contract resulting from the RFP (see Option 1 and Option 2 of Appendix A to the Province's corporate RFP template), the successful proponent has already agreed to all of these terms and conditions by submitting a proposal and cannot now propose its own form of contract during the contract finalization stage. Use of the contractor's form of contract should be avoided. If the contractor insists on including additional or new terms and conditions from its own form of contract, contact [Legal Services Branch](#) for advice as any new terms and conditions must be satisfactory to the Province.

12 DEBRIEFING

What is the purpose of a debriefing meeting?

The debriefing meeting provides an unsuccessful proponent with the opportunity to learn about their proposal's strengths and weaknesses. This feedback may help a proponent better understand government's Request for Proposals (RFP) process and prepare successful proposals for future competitions by identifying areas for improvement. Refer to [Debriefs](#) for more information.

What might happen if the debrief doesn't go well?

As long as the ministry has followed the evaluation process defined in the RFP, the meeting is unlikely to result in issues or complaints with the process. The law of competitive processes allows purchasers to establish criteria and assign weightings as deemed appropriate. It is only if points are awarded inconsistently or the stated process is not followed that there may be cause for concern. Although a good RFP process cannot prevent issues and complaints from arising, it does provide the ministry with the basis to explain and defend its process.

Refer to [Vendor Complaints](#) for more information on the options available to a proponent who has a complaint about the RFP process.

When should debriefs be scheduled?

It is generally recommended that debriefing meetings be conducted after the procurement process has ended or after a written contract has been signed. If a ministry is considering holding debriefings earlier than this, seek advice as there are risks (for example, if debriefings are held before a contract has been signed and finalization discussions fall through with the successful proponent, the Province may lose the opportunity to engage the next-ranked proponent).

Is there more information available on debriefs?

Yes. Refer to [Debriefs](#) for more information on the purpose of a debrief, who should attend, how to prepare, the suggested format to use, and what information can be disclosed.

Should the proponent be given a copy of the final evaluation of their proposal?

The general practice is to prepare a summary of the individual proponent's score sheet that identifies where points were awarded, where they were lost, and supporting comments for each. If the summary can include positive comments on the proponent's proposal, it will improve the success of the debriefing. A copy of this summary should be given to the proponent for their reference.

What advice should the ministry provide to unsuccessful proponents?

After reviewing the evaluation results and answering any questions, proponents should be reminded of the guide prepared for proponents: [Responding to Government RFPs](#). If the proponent is interested in finding out about other bidding opportunities, they should be directed to [BC Bid](#). Proponents might also be interested in the information available on [BC Bid Resources](#).

At the end of the debriefing, assure the proponent that each RFP stands alone and the outcome of one process will not affect evaluation of their proposals in subsequent RFPs.

What if the proponent has concerns with the fairness of the process?

Although there is disappointment with not being successful, most proponents find the debriefing process provides useful feedback and satisfies them that the process was conducted fairly. If a proponent still has concerns with the process, refer them to the information contained in [Vendor Complaints](#).

13 DOCUMENT RETENTION AND INFORMATION SHARING

What documentation should be retained on file?

A basic rule of thumb is that any record created during the RFP process is a document that must be retained. This includes: the RFP document, individual team members' evaluation notes, final evaluation notes and scores, scoring guides, reference check questions, responses from references, meeting notes, proposals received, proponent correspondence and responses, emails relating to the RFP and process, and contract finalization information.

At the conclusion of the RFP process, the original copy of each proposal should be retained on file. Unless they contain evaluation notes, the other copies can be destroyed. For contract administration reference purposes, it might be appropriate to retain a second copy of the successful proposal for the contract file.

Refer to [File Close Out](#) for more information on what records should be maintained.

How long should RFP files be kept?

[Chapter 12 of the Core Policy and Procedures Manual](#) defines the expectations for records management in government. The ARCS (Administrative Records Classification System) usually requires that all records created as part of a contract process, including an RFP process, be retained for seven years. However, the recommended best practice is to retain a copy of the posted RFP and any addenda for at least the term of the resulting contract from the RFP exceeds five years (including any options to renew or extend), plus two years in case any litigation arises in respect of the contract. It may be helpful to have the whole file available to assist in the development of the next competitive process for that contract.

Are there general guidelines for releasing information during an RFP process?

The [Freedom of Information and Protection of Privacy Act](#) determines the nature and timing of information that can be released during and after an RFP process. In addition, the nature of the information requested and the complexity of an RFP will influence the timing of the release and the extent of severing required.

Refer to the [Release of Information &/or Documents Related to Competitive Procurement Opportunities](#) for guidance on what can be released upon request and what cannot. Any information that is not routinely released will require a formal FOI request through [Information Access Operations](#).

Advice on releasing information during a specific RFP process is available from [ministry procurement specialists](#) or through the [Information Access Managers](#).

14 CONTACTS

The Procurement Services Branch is responsible for supporting government procurement activity, and can be contacted as needed for advice and assistance related to the procurement process. The Procurement Governance Office is available to provide advice on the expectations of government procurement policy. The Strategic Business and Procurement Transformation Branch provides guidance on the procurement process, and ensures that corporate tools and templates are updated to meet the needs of users.

Procurement Services Branch

Phone: 250 387-7300 (Victoria)

Fax: 250 387- 7309 (Victoria)

E-mail: procurement@gov.bc.ca

Website: <http://www2.gov.bc.ca/gov/content/governments/services-for-government/bc-bid-resources/support-services/procurement-services>

Office of the Comptroller General, Procurement Governance Office

E-mail: procurementgovernance@gov.bc.ca

Website: <http://www.fin.gov.bc.ca/ocg/pgo/pgo.htm>

Strategic Business and Procurement Transformation Branch

E-mail: Procurement.Transformation@gov.bc.ca

Website: <http://www2.gov.bc.ca/gov/content/governments/services-for-government/bc-bid-resources/support-services/procurement-transformation>

In addition to the above contacts, the following may also be useful contacts for RFP processes:

- [Legal Services Branch](#)
- [Ministry Procurement Specialists](#)
- [Procurement Community of Practice](#)
- [Procurement Council](#)
- [Risk Management Branch and Government Security Office](#)

Courses in procurement are also available; refer to [Procurement Training & Development](#) for more information.

15 GLOSSARY AND DEFINITIONS

Refer to [Procurement and Contract Management Terminology and Definitions](#) for definitions of terms used in this guide.

16 QUICK LINKS

BC Bid: <http://www.bcbid.gov.bc.ca/open.dll/welcome>

BC Bid Resources

<http://www2.gov.bc.ca/gov/content/governments/services-for-government/bc-bid-resources>

British Columbia Public Service Agency: <http://www.bcpublicserviceagency.gov.bc.ca/index.htm>

Core Policy and Procedures Manual, Chapter 6 Procurement

http://www.fin.gov.bc.ca/ocg/fmb/manuals/CPM/06_Procurement.htm

Freedom of Information and Protection of Privacy Act

http://www.qp.gov.bc.ca/statreg/stat/F/96165_01.htm

General Service Agreement

<http://www2.gov.bc.ca/gov/content/governments/services-for-government/bc-bid-resources/templates-and-tools/service-contract-templates/general-service-agreement-information>

Office of the Comptroller General, Procurement Governance Office

<http://www.fin.gov.bc.ca/ocg/pgo/pgo.htm>

Procurement Services Act: http://www.qp.gov.bc.ca/statreg/stat/P/03022_01.htm

Procurement and Contract Management Program

<http://www2.gov.bc.ca/gov/content/governments/services-for-government/bc-bid-resources/support-services/procurement-training-development/pcmp> <http://www2.gov.bc.ca/gov/content/governments/services-for-government/bc-bid-resources/support-services/procurement-training-development/pcmp>

Procurement Services Branch (PSB)

<http://www2.gov.bc.ca/gov/content/governments/services-for-government/bc-bid-resources/support-services/procurement-services>

Request for Proposals (RFP) Template

<http://www2.gov.bc.ca/assets/download/AB78ACB0A8CC44BCA26DCA52F5D435A4>

Standards of Conduct for Public Service Employees

<http://www2.gov.bc.ca/myhr/article.page?ContentID=45bf7662-adf9-8a5f-74f1-657fedd69edf>

Trade Agreements

<http://www2.gov.bc.ca/gov/content/governments/services-for-government/bc-bid-resources/reference-resources/corporate-requirements-and-guidelines/trade-agreements>

Vendor Complaint Review Process

<http://www2.gov.bc.ca/gov/content/governments/services-for-government/bc-bid-resources/reference-resources/vendor-relationships/vendor-complaints>