BC Bid Practice Scenario

Background

1. You are a Procurement Specialist within your Ministry.

2. The Deputy Minister has asked you to procure a consultant to assess the current catalogue of courses, workshops, and career learning available to your branch. This Opportunity will be issued by your Ministry and issued for your branch. The budget is $100k.

3. The Request for Proposal (RFP) needs to close on March 31, 2022, to have the assessment delivered no later than June 1, 2022.

4. You will be using BC Bid to initiate an RFP.

5. You will run an open competition. Company A is a reputable organization in this sector, and you have decided to send them an invitation to the Opportunity.

1 Set up Sourcing Project

A. The **Sourcing Project Type** that will give you access to a Request For Proposal Opportunity Type is Strategic (Multistage).

B. Your Ministry is issuing the RFP for your branch.

C. The type of consulting services you need is related to learning which falls under human resources. Search your commodity accordingly.

D. Remember to **Save** once you have all mandatory (*) fields completed in the Set up Project tab.

E. Now it is time to **Set up Team**, for this practice, key in 'Anne' in the Selected users field and select MCKINNON Anne, now key in 'Ben' and select ROSCHE Ben. Assign a Contributor profile for both.

F. Send them a note via the **Discussion Forum** to let them know you are adding them to the Sourcing Project, and you are looking forward to their support.

G. In the **Set up Documents** tab, upload the documents that will be shared with your team and need review before issuing the Opportunity (e.g., the draft RFP). Remember that your documents are added in the **Sourcing Project Documents** section of the Set up Documents tab. This section is at the bottom of the page.

H. Go to the **Add Suppliers** tab. You will see Public Portal which is where all open competition Opportunities are advertised. You also need to add Company A. In the **Select Suppliers** textbox, input the name Company, and select Company A. from the dropdown list. Click on that name, then click outside of the dropdown list. You will now see that Company A. and Public Portal are in the list of invited Suppliers. Click **Save**.

2 Prepare your RFx

A. Now you are ready to **Prepare RFx**.

B. In the **Prepare RFx – Setup** tab complete the open fields.

    i. In the **Opportunity Type** dropdown list, you will find Request for Proposal.

    ii. In the **Summary Details** textbox input "The Province is seeking proposals for consulting services that will assess the current catalogue of courses, workshops and career learning resources offered to the government employees."

     iii.   Complete the **Issue Date** and **Closing Date & Time** according to the dates provided in the background information.

C. It is time to **Validate & Save** your entries. This will open several new tabs which you can see displayed in a row after the first Prepare RFx – Set up tab.

i

Note: If inadvertently you clicked on Save and Close instead of Validate & Save, the application will take you to the buyer dashboard.

In order to find your Opportunity again and continue preparing your RFx, go to the Home tab, and click on the Sourcing Projects icon:
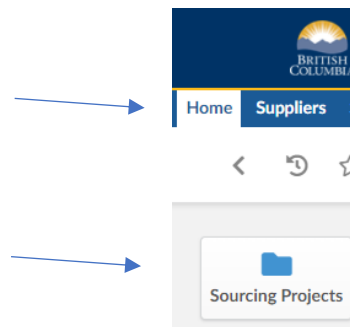
that will display a list of your recent opportunities, click on the underlined Opportunity Description of the project you are working on:

and it will take you back to the Set up Project tab. From here you can go to Prepare RFx and continue your scenario

D. As you continue to update the **Prepare RFx – Set up tab**:

     i.   You will notice an application generated number in the **Opportunity ID** field. It is not necessary to change this number but for practice, input a custom number.

ii. The next open field is the **Estimated Amount**. Type the amount that was provided in the background information.

iii. In the **Category** field, select the relevant category.

iv. In the dates section further down, you will notice a new field for **Enquiries Deadline**, select 1 week before the Closing Date.

E. Now you continue the **Prepare RFx – Additional RFx Info** tab:

i. Notice the default is BC Bid Electronic Submission. Select the checkbox next to **Email Submission** to also enable Email Submissions. Add your email when prompted.

ii. You want the consultant to perform the assessment at your office location. Complete address fields.

iii. Select the **Region** where the assessment will be done.

iv. **Validate & Save** your entries.

F. Now, continue to update the **Prepare RFx – Documents** tab.

i. Here you have two options: (1) you can upload a document directly; or (2) you can add documents previously added to the Setup Documents tab. Click on **Add file from Set up Documents**. You will see the previously uploaded documents. Select and add the final RFP that will be published on BC Bid.

ii. As you continue working in Prepare RFx – Documents tab, using the **Upload a Document** box, upload here all final documents that will be published with the RFP (like a Response Form, if not included in the RFP document).

iii. Use the 🔍 **View as Supplier** hyperlink to confirm that only documents to be published are in this tab. Only documents that are in 'Approved' status will be visible.

G. Now you continue moving in the **Prepare RFx – Suppliers** tab.

    i.   Here you will see the default Public Portal and the invited supplier Company A.

H. Continue moving to the **Prepare RFx – Approvals** tab.

    i.   Select **No** to the Legal advice required field and provide a reason, like: Opportunity does not meet any of the requirements to use Legal Services Branch, as described in [Core Policy Chapter 6](#).

    ii.   You did not require Risk Management consultation, so the answer is **No** and provide the reason, like Not Applicable.

    iii.   The Expense Authority Approval is mandatory to undertake procurements, so you select **Yes** and upload your confirmation document.

    iv.   You will notice that the 'Procurement Services Branch approver' field is greyed out. This is because you are issuing an Opportunity within the threshold.

I. Moving to the **Prepare RFx – Approval Workflow** tab.

    i.   You will see that the only orange coloured box in the diagram in the Ready to Issue. This means that all approvals have been completed.

3 Issue Your Opportunity

A. Click on top green **Ready to Issue** button.

B. Click on top green **EA Approved** button.

C. Click on top green **All approvals complete** button.

D. Click on top green **Issue Opportunity** button.

E. Click **OK** when prompted.

F. Return to the **Prepare RFx – Setup** tab and confirm that the RFx Status is Open.

4 Manage the Opportunity

A. During the first week after opening the Opportunity, you have received 15 enquiries from various Suppliers. You need to submit the answers in the form of an Addendum for Questions and Answers to all Suppliers. Use the **Discussion Forum** to upload your Addendum and send to all.

B. You have been asked to extend the Closing Date & Time by 1 week, to give proponents more time to prepare and submit their proposals. Go to the **Prepare RFx – Setup tab** to change the Closing Date & Time.

C. Use the **Discussion Forum** to notify that the Closing Date & Time is changing.

D. You have been asked to request an additional assessment to the catalogue of courses. An **Amendment** needs to be issued to add the requirements:

   i. Go to the **Prepare RFx – Setup** tab and look for the **Other Actions** dropdown button, click on the dropdown list and select Create a new amendment.

   ii. The new window will have the option **Copy from selected RFx**, which is the right selection if you want to carry over your information into this new Amendment.

   iii. Click on **Create and Close**. A warning will tell you that documents will be copied, and you want it that way, as the information in these documents have not changed. You will be adding the requirement via a new document upload called: Amendment – Additional Assessment.

   iv. In the **Prepare RFx – Setup** tab, complete all mandatory fields. **Validate & Save.**

   v. In the **Prepare RFx – Documents tab,** upload the document with the added requirement.

vi.   Repeat all steps to issue Opportunity: Ready to Issue; EA Approved; All approvals complete; Issue Opportunity; and OKs.

vii.   Return to the **Prepare RFx – Setup** tab and confirm that the RFx Status is Open.

5 Close the Opportunity

 Note: In order to follow the path through its entirety, we'll need to close the Opportunity. To force-close the Opportunity, follow the steps below. This function is being used for training purposes.

A. Go to the **View RFx Activity** tab. If there are Submissions, or invited Suppliers, they will be displayed in a messaged at the bottom of the page. "All Submissions are sealed. The person in the Responsible role can unseal the Submissions after the Closing Date & Time". *Do not unseal Submissions now.

B.   To force-close the Opportunity, go to the **Prepare RFx – Setup** tab and click on the **Other Actions** dropdown button, which can be found on the top of the screen.

C. Click the **Other Actions** dropdown button and select **Close Opportunity**. A Notification displays the message: Do you really want to close the RFx before the Closing Date & Time?

D. Click **OK** and a second notification will appear.

E. Click **OK** and the Prepared RFx – Setup tab will display Lot 1, Amendment 1 (Closed) in the **Selected Lot – Amendment** dropdown.

6 Upload Email Submitted Proposals

A. Go to the **View RFx Activity** tab in your left panel. Here you will notice a row with the invited Supplier Company A.

B. Click on the **+** sign under Submissions. A Supplier Submission window will open. Upload the Response Form from Company A. In the **Offline Submissions Receipt Date** select today's date and time. In the **Label** textbox enter "Submission from Company A."

C. Click **Submit; I agree and submit** and **Save and Close**.

D. Now let's pretend 3M Company and ABC Inc also submitted their proposals via email.

E. Go to the **Add Suppliers** tab on the left panel. In the **Select Suppliers** textbox, input the name "3M Company", then the Supplier's name will be displayed in the dropdown list. Click on that name, then click outside of the dropdown list and **Save**.

F. Repeat the tasks to add ABC Inc.

G. At this point you will see Public Portal, Company A, 3M, and ABC in the Invited Suppliers window.

H. Now go back to the **View RFx Activity** tab and repeat all steps required to submit responses from 3M and ABC.

I. Click on the **Refresh** button and note that all boxes under the Submission Available Confirm with Refresh column are checked.

J. Now go to the **Prepare RFx Setup** tab. At the end of the page, you will see the blue lock: click on it, then OK and note the legend: Submissions are now available for evaluation….

7 Analyze and Award

A. Move down on the left panel to the **Analyze & Award** tab.

B. At the end of the page, you will see the 3 suppliers. Click on the title of each supplier and a pop-up window will display the responses you submitted. To get out of each pop-up window click on the **X** on the top right corner

C. Back in the **Submissions** page, under the Decision column for Company A., click on the Do not award sign. Do the same for ABC Inc.

D. Now select 3M Company as the lead proponent by clicking on the trophy under the Decision column.

8 Notify and Share

A. We are almost done. Go to the **Notify & Share** tab

B. Click the **Send Notification** for Company A. Note in the Message section the blue highlighted instructional text - that needs to be deleted. Read the message and if you are comfortable with the content, Send & Close. Otherwise, edit the message as you wish.

C. Follow same tasks for ABC Inc.

D. For the awarded Supplier '3M Company', the message is different. Read and if happy, Send & Close, otherwise edit as you wish.

E. In the same window, click on **Contract Award Summary** box which is only displayed for the awarded Supplier.

F. In the **Contract Number** field, enter a name or number that you and your team can identity, like, "Consulting Agreement # 1 for 3M Company"

G. Enter the Date, Contract Value, Issuing Location, and the email for the Contract Manager.

9 Complete and Close

A. Go to the **Prepare RFx** tab and click on the Complete box beside RFx Status

B. Now go to the **Set up Project** tab and in the status dropdown list select Closed.

The End