



A Ministry Guide to the Request for Proposals (RFP)

(Reference: Request for Proposals template published June 15, 2026)

Disclaimer

This guide is not legal advice. To seek legal advice, contact the Legal Services Branch,
Ministry of Attorney General.

To seek procurement advice, contact your Ministry's procurement specialist, or the Deal
Management Office in the Procurement and Supply Division, Ministry of Citizens' Services.

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Ministry of Citizens' Services

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1 About This Guide

The purpose of this guide is to help ministry buyers (referred to as “you” throughout this document) to navigate the Request for Proposals (RFP) process. It reflects the BC Government’s (the Province’s) policy set out in the [Core Policy and Procedures Manual \(CPPM\)](#) and, in particular, [Chapter 6: Procurement](#).

This guide is specific to the updated corporate RFP template released in 2024, and which is periodically revised. The template consists of two documents, the RFP template and RFP Appendix B Response Form, which can be found on [BC Procurement Resources, Solicitation processes and templates](#).

This guide contains references to the following key contacts. These organizations will be referred to by their acronyms throughout.

NOTE: The links to key contacts are only provided here and not throughout the document.

- [Procurement and Supply Division \(PSD\)](#)
- [Deal Management Office \(DLM\)](#)
- [Legal Services Branch \(LSB\)](#)
- [Risk Management Branch \(RMB\) and Government Chief Risk Office](#)
- [Office of the Comptroller General](#)
- [Procurement Governance Office](#)
- [BC Procurement Resources Buyer Supports](#)
- [Ministry procurement specialists](#)

1.a How can I search for specific information in this guide?

To find specific information in the following ways:

- Refer to the Table of Contents or Guide-on-a-Page.
- Search for key words using the Find Text or Tools function.
- Search Bookmarks to see all the questions in the document. To open Bookmarks panel, click the bookmark icon in the vertical toolbar on the right side of the window  .

To display the bookmark panel, click ‘View’ from the main menu, select ‘Show/Hide’ from the drop down, then ‘Side panels’ and click ‘Bookmarks’.

1.b What is in this guide?

This guide:

- Outlines your responsibilities, from developing and issuing an RFP document to awarding the contract to the successful proponent.
- Provides guidance on how to prepare an RFP document and manage issues that may arise.
- Includes examples that illustrate suggested approaches to documenting specific steps in the process.
- Includes links to other resources relevant to the RFP process.

1.c What is the difference between a proponent and a contractor?

You may find people use the terms supplier, proponent and contractor interchangeably. This may cause confusion and add legal risk if used incorrectly.

In the [CPPM Glossary](#), the definition of supplier is “A person, business or other legal entity that could provide goods, services, or construction.”

In the RFP template, the definition of proponent is “a single legal entity with the legal capacity to contract (excluding its parent, subsidiaries or other affiliates) or natural person with the legal capacity to contract, that submits a Proposal.”

In the RFP template, the definition of contractor is “the successful proponent who enters into a contract with the Province.”

1.d Can I use this guide to do an RFP under a Single-Use List Request for Qualifications (SULRFQ) or a Multi-Use List Request for Qualifications (MULRFQ)?

No, this guide was not designed for use with those types of solicitation methods. If you plan to use a solicitation under a SURFQ or MULRFQ and want to know if specific parts of this guide apply, seek advice from your ministry procurement specialist first, then PSD or LSB.

1.e Can I use this guide for a Negotiated Request for Proposals (NRFP) or Request for Standing Arrangements (RSA)?

No. Negotiated Requests for Proposals or Request for Standing Arrangements are custom-made solicitations made to suit a particular procurement, so the information here may not be applicable. If you plan to do an NRFP or an RSA, please consult your ministry procurement specialist, PSD, or LSB.

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

No. This guide applies only to ministries of the BC Government. This guide and the RFP template were designed for ministry use and reflects the Province's policy set out in the [Core Policy and Procedures Manual \(CPPM\)](#) and, in particular, [chapter 6](#). Broader public sector entities may have different policy obligations.

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

Need more information? Reach out to your ministry procurement specialist first, then PSD or LSB, check out the [BC Procurement Resources](#) website, [CPPM 6](#) including its [glossary](#) and the [Procurement Practice Standard](#) (note: the Procurement Practice Standard is only available to BC Government employees).

TIP: If you have questions about B.C.'s procurement policy ([CPPM 6](#)) or its interpretation, contact the Office of the Comptroller General and the Procurement Governance Office.

2 The Request for Proposals (RFP) Overview

An RFP is a competitive solicitation where submissions (i.e. proposals) are scored. The supplier whose proposal meets all mandatory requirements and minimum scores (if any) and achieves the highest score wins the contract.

2.a Why should I use a Request for Proposals?

An RFP is one of the standard solicitation strategies used by the Province to compete contract opportunities. The Province's RFP process is designed to:

- Support the principles of fair, open, and transparent procurement.
- Satisfy your business requirements.
- Meet the expectations of provincial policy, applicable trade agreements, and law.

An RFP may be suitable if you want to evaluate more than price in your purchase (though price could be the main focus) and you can include your contract terms and conditions in the RFP.

RFPs are a versatile procurement tool. They can be used for procurements of any size and the process can range from a single step to multiple stages for complex and large opportunities.

Note that the RFP template is designed for a single contract for services. If you want to use an RFP to procure more than one contract or if you want to purchase goods, seek advice you're your ministry procurement specialist, PSD or LSB ([CPPM 6, policies 35 and 36](#)).

2.b Do I have to use the standard RFP template?

Yes. If you chose to do a Request for Proposals, the Province's policy requires ministries to use the standard RFP template unless LSB has advised on changes to the RFP, or has prepared or advised on other solicitation documents or processes ([CPPM 6, policies 35 and 36](#)).

All information in a procurement must be provided to suppliers in a non-discriminatory way ([CPPM 6, policy 37](#)). The RFP template is designed to ensure that key information about an opportunity is communicated to proponents and all suppliers have access to the same information.

The most recent version of the RFP templates should always be used. The Province updates these templates regularly, so save the link to the [BC Procurement Resources: Solicitation Templates](#) page to ensure you always have the latest version.

2.c What are the key things I should think about before I begin an RFP?

Here are a few tips to consider as you begin your RFP process:

- Keep the language in your RFP clear and concise. Overly technical language can confuse suppliers and discourage participation.
- Involve key interested parties in the RFP drafting stage. You will need them to provide the necessary insights and to accurately define requirements. This will help ensure the success of your RFP (Note that if you want to engage suppliers at this stage, contact your ministry procurement specialist first, then PSD).
- Do not go into this process with any preferences for a particular proponent. It is critical that you and the evaluation team avoid biases, even if you are familiar with the market and its players.
- Document well. Proper documentation supports the principle of a fair, open and transparent process, and is essential in the event of an FOI request.

2.d How do I determine the value of my procurement?

When estimating the value of your procurement, consider the entire scope of the opportunity. This can include, but is not limited to, products, services, licensing, installation, maintenance and updates. Your estimated value must also include all fees, expenses and all potential options for extensions or renewals ([CPPM 6 policy 30](#)) exclusive of taxes.

2.e Which BC Government offices can support me in the RFP process?

Each ministry is responsible for managing their RFPs. You can find support at BC Procurement Resources Buyer Supports or your ministry procurement specialist. Refer to section [1 \(About this Guide\)](#) for links to these areas.

2.f When do I need to engage PSD on an RFP?

The Province's Core Policy ([CPPM 6 policy 9](#)) requires that ministries engage PSD (e.g. Deal Management Office, Strategic Projects Office, etc.) when planning a procurement when:

- The value of the procurement is \$10,000 or more for goods or \$250,000 or more for services.

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- The procurement impacts or involves multiple ministries.
- The procurement is high risk.
- A customized solicitation template is required, including negotiated processes or joint solutioning.

2.g What if the project is complex or multi-phased?

The appropriate procurement method should be determined based on the needs of your project. Contact your ministry procurement specialist first, then PSD for assistance in determining if an RFP is the appropriate process for a particular opportunity.

3 Planning for the Request for Proposals (RFP) Document

3.a What do I need to include in my RFP?

At a minimum, your RFP will need to include:

- Ministry contact information.
- Proposal delivery information.
- Planned suppliers' meeting(s).
- The ministry's specific requirements regarding the goods or services and any relevant background information.
- Directions for the content and format of proposals, including response guidelines that help proponents respond to the RFP.
- A description of the evaluated criteria and the evaluation process which will be followed to determine the lead proponent.
- The contract form that will be awarded or selected base terms and conditions.

3.b What is Contract A and Contract B?

Contract A is a Canadian procurement law concept that can arise when a supplier submits a compliant response to a competitive opportunity. When Contract A is formed, it creates legal obligations for both the buyer and the supplier and establishes the rules for how the procurement process must be carried out.

Under Contract A, the buyer commits to following the process described in the procurement documents, using the evaluation approach disclosed to suppliers, and treating suppliers fairly. In return, suppliers commit to meeting the procurement's requirements and remain bound by their response for the period specified in the procurement documents.

If more than one supplier submits a compliant response, a separate Contract A may be created with each supplier.

The final contract between the buyer and the successful supplier is commonly known as Contract B.

What is the difference between a binding procurement where Contract A is formed and a non-binding procurement?

A non-binding procurement is designed to avoid creating Contract A obligations and provide flexibility in evaluation, negotiations, and contract formation.

The RFP is a binding process that creates Contract A. If you want to explore non-binding process options for your procurement, [see Solicitation and Contract Options](#).

The following table illustrates some of the main differences between binding procurements where Contract A is formed and non-binding procurements.

Binding procurements where Contract A is formed	Non-binding procurements
Forms Contract A , a legally binding process contract between all compliant proponents and the buyer.	No Contract A is formed . However, the buyer still has a duty of fairness, transparency, and to operate in good faith.
Mandatory requirements . Every compliant bid must have passed any mandatory requirements. The Province must reject non-compliant bids.	The Province has flexibility in reviewing quotes. There may not be any mandatory requirements at the solicitation stage.
Once Contract B is formed , the buyer and successful proponent must enter into the contract form, in the manner specified in Contract A.	Contract form is flexible . If the process rules allow it, the Province may accept alternative forms of contract during negotiation.
Bids are irrevocable . Proponents cannot withdraw bids once they submit them.	Bids are revocable . If the process rules allow it, either party may withdraw from the process before signing a contract.
Evaluation is formal , and bids are scored and ranked.	Evaluation is informal . No scoring or ranking occurs.
Province must award the contract to the highest ranked proponent (unless no compliant bids exist).	Province is not obligated to award a contract and may select the supplier that offers the best overall value in accordance with the solicitation terms.
Contract terms are largely fixed and determined.	Some contract terms may be negotiated within the parameters defined in the solicitation before signing a contract. LSB advice regarding contract negotiations may be required (see CPPM 6 policies 44 and 45).

4 Using the Request for Proposals Template

The RFP template has three parts – the RFP itself, Appendix A Contract Form and Appendix B Response Form. The RFP and Appendix B can be found on the BC Procurement Resources site under [Solicitation Processes and Templates](#). Appendix A is included in the RFP template.

This chapter will take you through each section of the RFP template and offer advice and examples on what you should think about when writing your RFP.

4.a What do I need to know about the cover section?

The cover section provides critical information for suppliers. This information does not appear anywhere else in the RFP to ensure it is clear and easy to find. It includes the following:

- Notes to drafter
- The name of the ministry issuing the RFP
- The RFP name and number
- The Issue Date and the Closing Date and Time (both as defined in the RFP template)
- The permitted proposal submission methods
- The ministry's official contact person
- Whether a supplier meeting has been scheduled

4.b What should I know about the fuchsia text?

Notes to Drafter and fillable fields appear in fuchsia text throughout the template and are identified on each end with @@ symbols.

[@@Notes to Drafter are fuchsia bold and include symbols@@]

[@@Fillable fields are fuchsia plain text and include symbols@@]

Keep these instructions in until you finalize your draft but delete them before you post the RFP.

4.c Delivery of Submissions - What are the options for delivering proposals?

This section describes how proposals will be received.

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There are three ways proponents can submit their proposals: electronically (via BC Bid), email and hard copy. You can allow for one, two or all three submission options. Indicate the allowed submission method(s) in the RFP.

TIP: While electronic proposals submitted through BC Bid is the Province's preferred submission method, try to provide more than one delivery option whenever possible. Allowing suppliers to submit their proposal using the option that works best for them helps ensure a more inclusive submission process.

Electronic proposals: Proposals are submitted via the [BC Bid website](#) (i.e. e-bids).

Advantages of e-bidding include:

- Electronic proposals can be easily shared among the evaluation team, and simplifies searching for specific information within the document(s).
- BC Bid is convenient and more secure than email.

However, other considerations include:

- The cost to suppliers to submit a proposal through BC Bid is \$150 per year.
- Suppliers must apply and obtain a BCeID to access e-bidding.
- The person posting and managing the RFP on BC Bid, must monitor BC Bid for submissions and supplier questions. Refer to the [BC Bid user guides](#) website to find guidance on how to use BC Bid.

Emailed submissions: Proponents can submit their proposal by email. Some prefer this method because it is familiar, convenient and low cost; however, there is the risk to using email. The Province uses the date and time the email arrives in its inbox to determine if the proposal was delivered on time. If a proposal arrives after the deadline (e.g. the email was delayed between when it was sent and when it is received in the Province's inbox or the Province's email system mistook the proponent's submission as spam or malware) it would have to be rejected.

Hard copy: Proponents can deliver a hard copy and an electronic copy on a USB drive to the address provided. This submission method carries a higher risk due to the time it can take to deliver the proposal, particularly if using mail, and availability of ministry staff to receive and time stamp hard copy submissions.

4.d Official Contact – What does the Official Contact do?

The Official Contact is ministry's contact person and the gatekeeper in the RFP process. They direct questions to the appropriate person for an answer and provide all questions and answers to the suppliers (i.e. posted on BC Bid). The Official Contact does not need to be a decision maker.

Identify only one person as the Official Contact to ensure consistency and maintain control over the information flow during the RFP process.

If you are using BC Bid and a PSD procurement specialist is posting the RFP to the system for you, they will be the Official Contact for the RFP.

NOTE: Do not include a phone number. All correspondence with interested / participating suppliers during an open RFP should be in writing only via BC Bid to protect the integrity of the process.

4.e What is a Supplier Meeting?

A supplier meeting, held in-person or virtually, is an opportunity to meet with interested suppliers to ensure a shared understanding of the RFP requirements. You can use the meeting to emphasize or explain important or complex issues. Suppliers will likely ask questions. Note that responses to these must be made available to all suppliers via an addendum on BC Bid.

Use this section to inform suppliers of the date, time and location of a supplier meeting (if you will hold one) and whether attendance is optional or mandatory. If the meeting is mandatory, include this in the RFP's mandatory requirements section.

NOTE: The purpose of the supplier meeting is to provide clarity to the suppliers about information and requirements provided in the RFP. It is not like a Discovery Day where buyers invite suppliers to share what the suppliers have to offer.

NOTE: It is recommended that you hold the supplier meeting at least two weeks after the RFP is posted and at least two weeks before it closes. This helps ensure suppliers have time to prepare to attend and to revise their proposal, if necessary, after the meeting.

You do not have to hold a supplier meeting, but it can be useful if the contract requirements are complex or if those in the industry are typically not used to responding to RFPs.

If you hold one, you must provide a verbatim transcript or minutes, either posted to BC Bid via an addendum or otherwise distributed to suppliers.

Virtual meetings are convenient, and the application used may be able to create a meeting transcript. If you are considering a virtual meeting that will be recorded, contact your ministry procurement specialist and seek advice from LSB. Some edits are likely required to the RFP template language specific to the recording, and you may need advice on legal risks of recording a meeting.

Tip: If the meeting is virtual, state that interested suppliers should request access information from the Official Contact rather than including the details in the RFP. This can help you maintain a record of attendees and prevent disruptions.

4.1 RFP Section 1: Summary of the Opportunity

The summary of the opportunity is a brief overview of what is being procured.

4.1.a How detailed should the Summary of the Opportunity be?

The summary should provide enough information and context for proponents to decide if they want to read the whole document. Include a brief description of what is being purchased, and related details on the project or program requirements (e.g. what services are needed, timelines for service delivery, including options to extend, location where services are required or goods need to be delivered, etc.)

Tip: To see examples of opportunity summaries, you may want to look at similar RFPs on BC Bid.

4.2 RFP Section 2: RFP Process Rules

4.2.a What are the RFP Process Rules for proponents and proposals?

Section 2 of the RFP contains the rules that govern the process. Do not modify any of these terms and conditions unless LSB either provides advice on or drafts the revisions, except as allowed within the template ([CPPM 6, policy 35](#)).

4.2.b How are definitions managed?

Clause 2.1 defines key terms used throughout the document.

Tip: You may want to take note of these commonly misused terms: “must,” “mandatory,” “should,” “may,” “weighted,” “Proponent,” “Contract,” “Contractor,” “Province,” and “Ministry.”

All defined terms should be capitalized throughout the documents when used as defined, so readers know that term has a specific definition in the RFP. These terms should be used consistently as they ensure a shared understanding of the language used throughout the RFP. Do not use synonyms in place of a defined term (e.g. don't use "bidder" instead of "proponent").

Add terms to the definitions section if you are using any acronyms or terms that have a specific meaning in your procurement project.

4.2.c Can I change or add definitions to the RFP template?

Yes, you can add definitions specific to your RFP; however, be careful not to add new definitions that may contradict or interfere with those provided in the template. If you want to change any of the definitions provided in the RFP template, contact LSB.

4.2.d Can multiple suppliers be included in a single proposal to deliver the services?

Clause 2.12 allows proponents to submit a proposal where one supplier is the proponent and all others are proposed subcontractors, see "Proponent" definition in the RFP template. If such a proposal is successful, you would enter into a contract with the proponent, and the other suppliers would be named as subcontractors. The contractor is responsible for all deliverables, including those provided by the subcontractors, and you would have no direct relationship with the subcontractors.

For some RFPs, proponents may prefer to offer a joint proposal, where two or more suppliers form a new legal entity if their proposal is successful. If you want to accommodate joint proposals, contact your ministry's procurement specialist and LSB for assistance with revising the process rules before you begin your procurement.

4.2.e Do trade agreements always apply?

No. Trade agreements only apply when the estimated procurement value meets or exceeds the threshold set by a particular trade agreement. The notes to drafter at clause 2.30 set out the thresholds for each trade agreement that may apply. If in doubt, contact LSB for advice.

Learn more about [New Purchasing Directives](#).

4.3 RFP Section 3: Overview

4.3.a What should the Overview section include?

The Overview section should explain what you need. Include enough details for suppliers to understand who is buying, what is being purchased and why it's needed.

4.3.b What should the Ministry Responsibility subsection address?

Use this subsection to provide more context for an opportunity. Describe what the ministry program or branch is responsible for and how the project will affect the program's business or function. This section should also include any additional clients that will directly or indirectly draw on the services. You can also include links to websites that provide more details.

You may also include anything a supplier might think is in scope for them to provide but the ministry prefers to do themselves (e.g. engagement with interested parties, etc.).

TIP: Focus only on responsibilities that are directly related to what is being purchased.

4.3.c What should the Background subsection include?

Use this subsection to describe what led to this RFP (e.g. why you need a new service, what you need to support a program and why, or simply that an existing contract has exercised all options to renew and so you are going back to the market). You might refer to other work or projects that will impact this RFP's work.

TIP: If the services or anything related to the services are currently being provided by one or more contractors, name them and state whether they are eligible to submit a proposal. This transparency ensures that all proponents are aware of the current situation, including the possibility of competing against an incumbent contractor or a contractor who may be familiar with the ministry's needs.

4.3.d What should be included in the Scope subsection?

Use this subsection to define the services you want to purchase, the desired outcomes, the contract term (including options to extend) and any ministry preferences (i.e. services proponents are not required to offer but may score higher if they do).

TIP: When writing the scope, do not use the term “must” when describing the contract requirements (i.e. what the contractor will provide during the term of the contract). Use words such as “the Contractor will” so these contract requirements are not confused with the proposal’s mandatory requirements (i.e. “Proponents must”), which apply to all proposals.

Include any performance criteria, deliverables or other obligations that are not going to be used as RFP evaluation criteria.

You may also want to include the budget, the current state of operations (e.g. the computer systems that they will need to work with) and transition activities if required.

4.3.e Can I add an out-of-scope section?

Out-of-scope is not a subsection in the template, but you may want to add one to describe related work the contractor will not provide, such as work done in-house or by another contractor. This can help clarify what is not in scope for proponents so they can price their proposal accordingly.

4.3.f Why is it important to identify the length of the contract?

It is important to identify the length – or term – of the contract, as this term will be part of the resulting contract. [CPPM 6, policy 47a](#) requires that every contract specify the contract term, including the initial term and any extension options. It tells proponents exactly what the service commitment will be and allows them to price accordingly. In addition, there may be trade obligations which require the RFP to disclose the duration of the contract.

Contracts must not include options to extend or renew, or contain multi-year terms, unless the RFP specifies it ([CPPM 6, policy 48\(c\)](#)). If you do not include options to renew or extend in the RFP and the contract, you cannot add them after the RFP closes.

If possible, state the expected start date and length of the contract in general terms unless there is a clear business reason to set exact dates (e.g. “two-year term starting spring 2025” versus April 1, 2025 – March 31, 2027). This allows more flexibility in case dates need to change. Some ministries may have restrictions on the overall term allowed for their contracts. If in doubt, contact your ministry’s procurement specialist.

If your contract spans more than one fiscal year, you must engage Treasury Board ([CPPM 6, policy 34](#)). This should be done before the RFP is released. To meet this requirement, first

connect with your corporate operations area to discuss your procurement requirements. If appropriate, they will facilitate engagement with Treasury Board.

Ensure that any engagement is properly recorded and available should verification of this engagement be requested during a compliance review or audit.

4.3.g What are options to extend?

Options to extend a contract allow you to continue contracting with the contractor after the initial term. If using options, your RFP must include the number and length of extensions you anticipate [[CPPM 6, policy 48\(c\)](#)]. These will carry over into the contract you sign with the successful proponent. If you are unsure whether you need an extension option, seek advice from your ministry procurement specialist first, then PSD or LSB.

TIP: If you plan to extend, you must have the required documentation approved and signed before the procurement begins. Do not rely on getting approval to extend once the contract begins.

NOTE: If your contract includes options to extend, once the contract term expires, any options to extend expire with it.

Policy does not specify a maximum number of extensions a contract can include, or the length of each. However, ministries may have their own policies or guidance that limit the length of contracts and/or options to extend.

TIP: The value of the procurement opportunity must consider all potential extensions ([CPPM 6.3.2, policy 30](#)). This value will determine what trade agreements apply, whether you need to post the opportunity on BC Bid, and whether you need to engage your ministry procurement specialist first, then PSD.

Describe if and how the contract price will change if you extend (e.g. 1. extend plan to extend on the same terms and conditions, with no change to price. 2. You plan to extend on same terms and conditions and price will be adjusted according to, e.g., a specific consumer price index). Consult with your ministry procurement specialist first, then PSD or LSB for extension pricing options.

4.3.h Why would the RFP disclose the budget?

In almost all cases, it is recommended that you disclose the budget.

Sometimes buyers worry that if they disclose the budget, all pricing proposed will be at or near the budget; however, sound planning should serve you well to estimate the cost of your purchase accurately so the risk of bids coming in at or around that estimate is typically worth accepting, especially in contrast to the alternative. If you do not disclose the budget, you face a greater risk of being obliged to accept a bid that is over the undisclosed budget or having to cancel the solicitation. Disclosing the budget can also help suppliers understand the scope of the services they are purchasing.

TIP: If the budget or volumes disclosed in your RFP are estimates only, make it clear they are subject to change.

4.4 RFP Section 4: Contract

Section 4 advises proponents of the contract terms and conditions the successful proponent will be expected to sign.

4.4.a Should all RFP documents include a sample contract?

Yes. You must include a contract form or, at least, the main terms and conditions of the contract in the RFP as Appendix A: Contract Form.

TIP: Do not underestimate the importance of setting clear contract terms and conditions. Be sure to align them to your project deliverables to avoid disputes later.

4.4.b What should I include in section 4.1 – Contract Terms and Conditions?

You are not required to add anything to this section but, if you choose to, use it sparingly. It is best used for calling attention to structural elements of the contract that proponents may not anticipate seeing, if there's anything outside of the usual. Appendix A should be the source for deliverables and scope. The RFP's Scope section should be the only summary of the deliverables and scope of the contract.

This section may be useful to draw attention to changes to what is typically boilerplate: e.g., if there are new provisions for intellectual property that deviate from the Province's usual approach, it would be worth calling them out in this section.

4.5 RFP Section 5: Requirements

4.5.a What is the Requirements section for?

Section 5 is template language to emphasize the importance of meeting all mandatory requirements and how proponents must use Appendix B for proposals. Do not make changes to this section without first consulting with LSB.

4.6 RFP Section 6: Proposal Format

4.6.a Why is the Proposal Format section needed?

Section 6 outlines how proponents should format their proposal. Do not edit this section without seeking advice from LSB.

4.7 RFP Section 7: Evaluation

Section 7 explains how proposals will be evaluated. Be careful how you word this section, as you cannot change the evaluation process after the RFP closes.

4.7.a What options are available for awarding the contract?

Most often, ministries award their contract to the proponent who meets all mandatory criteria and minimum scores (if any), and whose proposal has the highest ranking. However, a ministry may award multiple contracts using one RFP. For example, where contractors in different geographical regions will each be awarded a separate contract. In this case, edit the language in the Evaluation subsection to explain how this would work. If the RFP template requires these changes, seek legal advice from LSB (see [CPPM 6, policy 35](#)).

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

- “This RFP divides the province of B.C. 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.”

Contract awards must be made as described in the RFP without exception unless the RFP process is cancelled, and no award is made at all. If you wish to cancel an RFP, seek legal advice from LSB as this involves the exercise of a reserved right.

4.7.b Can I create a shortlist from this RFP?

Yes. A shortlist can allow you to add elements to your evaluation other than the proposal (e.g. presentation, interview, systems test, etc.). If you want to invite proponents who make the list to do something additional, explain these steps.

A shortlist process requires changes to the RFP template. Engage LSB to prepare or advise on changes ([CPPM 6, policy 35](#)).

NOTE: A shortlist is not an approved supplier list. If you want to create a list of qualified suppliers, speak to your ministry procurement specialist or PSD about a multi-use request for qualifications (MULRFQ) or single-use request for qualifications (SURFQ).

4.7.c How does shortlisting work?

Shortlisting divides the evaluation into one or more phases. The RFP must state the requirement (e.g. only the top X scoring proponents in phase 1 will continue to phase 2).

If you are including a shortlist:

- Add a section before Section 7.4 (Tie Breaker) of the RFP template that briefly describes what the shortlist process entails.
- In section 7.2 (Weighted Criteria), set out the scoring that will apply to the shortlisting process.

4.7.d What should be included in the RFP about the shortlist process?

The RFP should specify how and when a shortlist will apply including:

- How many proponents will be shortlisted.

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

Be sure to consider whether tied proponents would be included in the shortlisting, or how the tie would be broken.

4.7.1 Mandatory Criteria

4.7.1.a What are mandatory criteria?

Mandatory criteria are conditions a proposal must meet for it to be considered.

A proposal must meet all the mandatory requirements. If it misses even one, it cannot be considered. If you are unsure whether a mandatory requirement has been met, contact your ministry's procurement specialist first, then PSD or LSB.

4.7.1.b Can I change or add mandatory criteria?

Do not change the mandatory criteria set out in section 7.1. without first consulting the LSB. You can add mandatory requirements to those provided, if needed.

Include any new mandatory requirements to the table in section 7.1 and use the exact same wording if you repeat it anywhere else in the RFP.

TIP: Each mandatory requirement you add increases the risk that you may have to reject a good proposal. Try to keep the number of mandatories to a minimum and ensure they are critical to the success of the project. Instead, consider adding the requirement to the weighted criterion with a minimum score, rather than making it a mandatory.

Do not add criteria that are not required to evaluate a proposal. For example, while Commercial General Liability Insurance or a WorkSafeBC number may be required, they would not be requested until the award phase of the procurement.

4.7.1.c How should mandatory criteria be worded?

Mandatory requirements should be precise. The following tips may help:

- Avoid subjective wording (e.g. suitable, reasonable, acceptable, similar) unless these words are defined.
- Do not use ambiguous phrases. If the mandatory requirement requires experience, state “experience” rather than “an understanding of”.
- Provide instructions on how to meet the mandatory requirement (e.g. a photocopy of their required certification).

The word “must” is a defined term to describe a mandatory requirement. Before issuing the RFP, do a search for the word “must” to ensure it is only used for mandatory requirements.

4.7.1.d How many mandatory requirements can I add?

There is no limit to the mandatory requirements you can add. However, be mindful that each additional requirement increases the likelihood that you will have to reject an otherwise acceptable proposal.

4.7.1.e What is the difference between an RFP mandatory criterion and a contract mandatory requirement?

RFP mandatory criteria are conditions a proposal must meet for it to be considered.

Contract mandatory requirements are activities or deliverables the contractor must provide as part of the contract. Contractual requirements should be clearly identified in section 3.3, section 4.1, or in Appendix A: Contract Form of the RFP. Consult with LSB about identifying required contractual provisions.

4.7.2 Weighted Criteria

4.7.2.a What are weighted criteria?

Weighted criteria refer to the requirements described in Appendix B. Use the same headings and numbering from Appendix B when completing the Weighted Criteria table in section 7.2. See the instructions to drafter in the RFP template for more information on drafting weighted criteria.

4.7.2.b Do all RFPs have to disclose the point allocation?

Yes. Policy requires that the evaluation criteria and any weighting be disclosed (see [CPPM 6, policy 37 b](#)). You cannot deviate from the point allocations disclosed in the RFP when evaluating proposals.

4.7.2.c How should scores be assigned to weighted criteria?

It is up to you how you weight your criteria. You may want to allocate points so they add up to 100, but you don't have to. Determine points based on how many criteria you need to assess, and to make the assessment as easy as possible for the evaluation team.

The following example illustrates how points may be allocated for weighted criteria. Note that pricing never has a minimum score associated with it.

Example 1: Weighted Criteria Grid

	Available Points	Minimum Score
Capabilities	80	N/A
Approach	50	30
Price	70	N/A
TOTALS	200	

4.7.2.d Can I have multiple response guidelines for one weighted criterion?

Yes. You could have a high-level breakdown of points in your RFP (e.g. three or four categories), and a more detailed breakdown in your evaluation handbook.

If you have multiple response guidelines for one weighted criterion, but they are not weighted equally, describe the weighting in your RFP.

4.7.2.e What are the minimum scores?

A minimum score is the lowest score a proposal can receive for a weighted criterion and still be considered. A minimum score is a good way to ensure you do not end up with a successful proponent who demonstrates sound competency in most areas but is unacceptable in one.

If you choose to include minimum scores, you must disclose this in your RFP. You can include as many minimum scores as you like for any category except price. Do not have minimum scores so high that no proposal can meet them.

TIP: Consider disclosing the information proponents are expected to describe in their proposals to meet the minimum score.

If no minimum scores are assigned to any weighted criteria, you should include an overall minimum score.

4.7.2.f Can a proponent miss a category of weighted criteria and still be successful?

Possibly. A proponent can miss a category and still be successful if there is no minimum score assigned to the category.

4.7.3 Price Evaluation

4.7.3.a Are price evaluations different from those of weighted criteria?

Yes. Price is the only area where proposals are compared to each other rather than to pre-established criteria. Do not include any minimum score for price in the weighted criteria table in section 7.2 of the RFP.

See section [5.2.5 \(Price\)](#) of this guide for instruction on how to evaluate price.

4.7.4 Tie Breaker

4.7.4.a Why is a tie breaker section needed?

It is possible that more than one proposal will have the same highest score. You will use the categories you assign in section [4.7.2 \(Weighted Criteria\)](#) to create the tie breaker. This section of the template provides instructions on how to apply the tie breaker.

Here are a few things to consider when prioritizing the tie breaker categories:

- **Price:** Proposals tied for price may indicate that either proponent can do work, so selecting the one with the lower price may be in the ministry's best interest.
- **Capabilities or experience:** If you requested unit pricing (e.g. hourly, per diem, etc.) because you don't know how much work will be required, price may not be the best choice. You may want the supplier who scored higher in capabilities or experience, as

they may need less time to do the work. In this case, you would rank capabilities or experience higher.

- **Approach or methodology:** If the work is complex, you may want set approach or methodology as your first tie breaker, because the proponent who scored highest in this area may have a clearer vision and process to meet your needs.

4.7.5 Reference Check

4.7.5.a Do I have to check references?

No. Reference checks are optional. You may choose not to check references if it won't be necessary or suitable for this contract, if the lead proponent is known to perform well, or you are confident in the quality of their service.

NOTE: Policy requires an internal supplier reference check for all procurements where the estimated value is equal to or above \$10 million ([CPPM 6, policy 32](#)). Contact PSD for assistance, as well as LSB, as the RFP template will need to be modified to incorporate this process.

Do not change the language in section 7.5 unless you first get advice from LSB.

4.7.5.b How are references evaluated?

Reference checks are evaluated as pass/fail. Request an odd number of references to ensure you avoid a tie. Each reference should be asked the same questions. If the lead proponent passes, you don't need to check references for other proponents. If you are not satisfied, consult with LSB regarding your options.

If you want to evaluate references in a way other than pass/fail, consult with your ministry procurement specialist or PSD and seek advice from LSB.

If you need to conduct an internal supplier reference check, see [CPPM Procedure Chapter O: Internal Supplier Reference Check](#).

4.7.5.c Can I check references that are not provided by a proponent?

The RFP template contains language that permits the Province "to contact referees that were not provided to the Province by the Proponent". You may wish to contact your ministry procurement specialist, PSD or LSB to advise on potential risks. This process must be done in

connection with the services or goods that the proponent would be delivering if successful in the RFP and cannot be done just to target someone that an evaluator happens to know. It will draw attention and raise questions about why the additional checking is being done and if that has been applied unfairly as between proponents, then it could cause more problems than it would solve. Indigenous Languages Technology Standard.

4.8 Indigenous Languages Technology Standard

4.8.1.a What do I need to know about the Indigenous Languages Technology Standard?

The Indigenous Languages Technology Standard applies to all IM/IT systems used by the Province. If your procurement involves IM/IT systems, you will need to ensure that the successful proponent is able to comply with the standard.

Visit the [Indigenous Languages Technology Standard](#) website for more information, [including guidelines on how to adopt the standard](#).

If you are considering purchasing an off-the-shelf system and need support in understanding whether it aligns with the standard, contact the [Data Systems and Services request system](#).

4.9 RFP Appendix A: Contract Form

4.9.a When should Option 1, corporate template, be used?

Use one of the Province's general services agreements if one of the standard corporate templates is suitable for the services you need. The templates can be found here: [Solicitation processes and templates](#). If you think you may want to make changes to the corporate contract template, contact LSB.

4.9.b Which schedules apply to my contract?

If you use one of the corporate contract templates, schedules A (Services) and B (Fees) always apply, but other schedules may not. The following information may help you decide which schedules apply to your contract:

- Use Schedule C (Subcontractors) if you are permitting the contractor to use subcontractors.

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- You must use Schedule D (Insurance) without modification (except as permitted within the schedule's instructions) unless you have consulted RMB. If you are not sure what, if any, insurance you need or want to waive insurance requirements, contact your ministry procurement specialist, RMB and the Government Chief Risk Office.
- You must use Schedule E (Privacy Protection) if the contract involves the collection and/or use of personal information. You will need to do a privacy impact assessment to determine if personal information will be used or collected. See section 2.5 of the [Privacy Management and Accountability Policy](#) for when a PIA is required.
- If required, a [Privacy Impact Assessment](#) (PIA) and [Security Threat and Risk Assessment \(STRA\)](#) need to be completed before you begin the solicitation process. For assistance with a PIA and STRA, contact your [Ministry Privacy Officer](#).
- Use Schedule F (Additional Terms) to add additional terms. You must seek advice from LSB to use Schedule F.
- Use Schedule G (Security) if you require the contractor to treat any information as confidential or preserve the integrity or availability of any record. You must apply Schedule G if you use Schedule E, Privacy Protection.
- You must use Schedule H ([Tax Verification](#)) unless the value of the agreement is less than \$100,000 including any options to extend or renew.

NOTE: If any of these schedules will not apply to your contract, state which ones do not apply in Appendix A of the RFP. If you modify any of the schedules, include the modified schedule as an attachment to the RFP.

4.9.c When should Option 2, custom contract, be used?

If one of the corporate contract templates does not suit your needs, you may be able to use a custom contract. In this case, Consult LSB.

TIP: Do not embed the contract template in the RFP document, as this could affect formatting. Include it with the RFP as a separate electronic file and include a statement in the RFP that Appendix A is posted separately on BC Bid.

4.9.d When should Option 3, add select clauses, be used?

Add select clauses when you intend to finalize most of the contract terms and conditions with the successful proponent. In this case, do not attach a full contract form with the RFP. Instead, include only the non-negotiable contract terms and conditions. The final contract will include the full contractual terms and conditions as well as those in the RFP. LSB must advise on the select contract clauses included in Appendix A, and on any form of contract you finalize with the successful proponent.

Option 3 allows you to finalize the complete set of contract terms and conditions after you select the successful proponent. Note that the proposal forms the basis of the contract. You cannot make material changes to the proposal or to the terms and conditions set out in the RFP.

TIP: Option 3 can take more time to come to agreement on the full contract terms and conditions. Plan for extra time between notifying the successful proponent and signing the contract.

4.10 RFP Appendix B: Proposal Response Form

4.10.a What is Appendix B and why is it needed?

Appendix B is the proposal format proponents must use when they respond to the RFP (or one substantially similar). Having all proposals in a consistent format makes them easier to evaluate and helps proponents respond to the specific requirements in the RFP.

Do not make any changes to the language in the RFP under this heading. Information on how to complete Appendix B is in [section 5](#) of this guide.

4.11 Additional Appendices

4.11.a Why is Appendix C, Submission Declaration Form, no longer available?

Appendix C, Submission Declaration Form, was incorporated into Appendix B, Proposal Response Form, as Section 5.

The Submission Declaration includes language that binds the proponent to the RFP process and to the BC Bid Terms and Conditions of Use.

4.11.b Can other appendices be attached to the RFP?

You may attach as many appendices as needed to provide a complete picture of the RFP requirements (e.g. manuals, standards, reporting formats, drawings, maps, system architecture descriptions, blueprints, reports, etc.).

Do not replace or change the order of Appendix A: Contract Form or Appendix B: Proposal Response Form, as these are referenced elsewhere in the RFP. If adding appendices, start at Appendix C, reference them in the RFP and describe their purpose in the process.

4.11.c What if an appendix is a large file?

If any of these additional appendices are large electronic files, consider making them accessible via a file-sharing or hosting service specifically established for your procurement.

4.11.d What if the appendix contains confidential information?

BC Bid is a public website. If you need to provide confidential information for suppliers to understand the RFP requirements and benchmarks, do not post it on BC Bid. Instead, request that suppliers sign a non-disclosure agreement. You can then provide the information by email or a password-protected site. Seek advice from LSB on changes that may be required to the RFP template and non-disclosure agreement ([CPPM 6 policy 34](#)).

5 Completing Appendix B: Proposal Response Form

5.a Do I have to use Appendix B?

Yes. Proponents must submit their proposals using Appendix B, or a similar form. While you have flexibility in what you say in Appendix B, you must use it.

5.b Why is Appendix B used?

The purpose of Appendix B is to:

- Help the RFP writer understand what they should describe about their requirements and preferences.
- Make the evaluation process easier by ensuring responses are in a similar format.

5.c What is the Submission Declaration?

Section 5 of the Proposal Response Form is the Submission Declaration. Previously Appendix C, the Submission Declaration was incorporated into Appendix B. This section includes language that binds the proponent to the RFP process and to the BC Bid Terms and Conditions of Use.

5.1 Parts 2 and 3: Proponent Identification and Contact Information

5.1.a Why are there two sections for proponent contact information?

These two sections identify the proponent, the authorized representative, and the contact person for the proposal.

Part 2 identifies the proponent (i.e. the organization or individual) and the person authorized to bind the proponent to its proposal. If the proponent is an individual, this may be the same name as the authorized representative.

Part 3 identifies the contact person for the proposal if different than the authorized representative. For example, a proponent may name a director as their authorized representative but name an administrative member as the main contact.

5.2 Part 4: Requirements and Response Guidelines

5.2.a What should be included as criteria?

Requirements explain what the ministry is seeking and what the proponents need to address in their proposals. The tables in part 4 of Appendix B can be configured as needed.

Appendix B includes three examples of criteria:

- Capabilities (resources, availability, required certifications, etc.)
- Experience (organizational, individual and/or team)
- Price (how much will the proponent charge to deliver the services as described in the RFP)

You can change, replace, or add criteria in your response form. For example, you could include an approach or methodology section.

5.2.b Can I include social, Indigenous, environmental, or economic value criteria in my RFP?

Yes. The Procurement Strategy and Governance Branch in the Ministry of Citizens Services is leading a Pilot project (started in 2023) internal to government. This is being done through the BC Impact Procurement initiative in alignment with the [BC Procurement Plan 2024](#).

The pilot project is supporting and assisting ministry pilot participants to include these value criteria in their solicitation documents.

If you would like more information, please email procurement.transformation@gov.bc.ca.

Guidelines on including social and environmental value criteria are also available on the [BC Procurement Resources](#) website at the following links: [social purchasing](#) and [the Guidelines for Environmentally Responsible Procurement \(GERP\)](#).

Information about procuring and contracting with Indigenous Peoples is available in the [Indigenous Procurement and Contract Management Guidelines](#).

5.2.c What are Response Guidelines?

Response Guidelines tell proponents what they need to include in their proposals so evaluators can determine if they can meet the requirements.

When writing response guidelines, use active words such as “describe,” “explain,” “provide,” “identify,” etc.

5.2.d How do Response Guidelines and requirements work together?

Each Response Guideline must include one or more requirements (with the possible exception of price). Each requirement will have instructions to proponents on what information they should provide in their response to the particular response guideline.

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

No, but keep in mind that you will need to evaluate whatever information you request. Only request information that is relevant helps you identify the best proposal.

5.2.1 Desired Capabilities

5.2.1.a What should Desired Capabilities address?

Proponents will need to describe their ability to deliver the services.

Ask proponents to address all the elements they need to have as of the closing date of the RFP that demonstrate their ability to meet the contract deliverables.

Do not make this section unnecessarily restrictive or design it so only one supplier could possibly meet them. Aim for a balance that encourages competition while meeting project needs.

5.2.2 Desired Experience

5.2.2.a What elements could be included in the Capabilities section?

Some examples of capabilities include:

- Resources, such as staff capable of doing the work
- Availability to do the work within the specified timeframe
- Qualifications, such as certifications or licences specific to the organization or to an individual
- Formal corporate policies and procedures related to human resources, finances, dispute resolution, the environment, quality control and quality assurance, etc
- Facilities, where the proponent describes current or proposed space from which the services will be provided
- Computer network capabilities
- Equipment or tools that will be used to deliver the services

TIP: If using a minimum score, describe what would meet the ministry's basic requirements. This helps proponents understand what is needed and what to include in their proposals.

5.2.2.b Whose experience should be evaluated?

You can evaluate organizational, team and/or individuals' qualifications and experience, and the RFP should be clear on what will be evaluated.

If evaluating both organizational and individuals' experience, use separate tables or sub-headings to clearly differentiate the two.

5.2.2.c When should organizational experience be evaluated?

Evaluate the organizational experience if:

- The services require various types of resources or experts at different points of time.
- Timelines are critically important, and you need to be able to replace resources quickly if any become unavailable.
- Established corporate approaches to change management, business continuity planning, access to information, etc. are important to service delivery.
- The services are of a generic nature, and individual expertise is not critical to successful delivery.

TIP: If you are 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, consider evaluating the experience of an individual resource (key personnel) instead of organizational experience.

5.2.2.d When should only one individual's experience be evaluated?

Evaluate an individual resource if:

- Their experience is critically important to the success of the contract.
- Contract success is dependent on specific expertise not commonly found.

Where the individual was employed at the time they got the experience should not be relevant, whether it was while working for the individual's current employer, one or more previous employers, and/or for themselves.

If you plan to evaluate an individual's experience, include a requirement for the successful proponent to use that individual as named Key Personnel in the delivery of services under the contract.

5.2.2.e When should a team's experience be evaluated?

Evaluate a team if:

- The services cannot be delivered by only one individual.
- Contract success is dependent on expertise in diverse areas.
- The ability of the team to work well together is important to your project.

Where the team members gained their experience should not matter. If experience working together as a team on previous projects is important, explain this in the RFP and ask for a description of projects where the proposed team worked together.

If asking for the experience of a team, use one of these options:

- Option 1: Ask proponents to propose a team by identifying each team member and their role. Ask them to describe each member's qualifications and experience. State how many people will be evaluated, so proponents know how many to propose. 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.
- Option 2: Ask proponents to propose a team by identifying roles and responsibilities. If you use this option, specify the minimum number of members expected and identify the qualifications and experience required for the team. Note: Not everyone needs to have all the required experience, as long as the team does as a whole.

If you request information on multiple individuals' experience, include only roles that are critical to the success of the contract. You may also want to state that the Province understands others will likely be involved in the delivery of services but will only evaluate the experience of those proposed for the key roles.

5.2.2.f What if a named individual(s) is not available when the contract is signed?

If you require proponents to name individual(s) in their proposal, and their experience is evaluated as part of the weighted criteria, include a requirement for the successful proponent

to use that individual in the delivery of services under the contract. If an evaluated individual is not available at the time of contract signature, seek advice from LSB before signing the contract.

5.2.2.g What if I have concerns about a contractor changing key personnel during the term of a contract?

When planning your procurement, be sure your form of contract explains a process for replacing named key personnel. Sometimes, people named in a role under contract may not be available for the full contract terms due to situations outside the contractor's control.

If you are using a General Service Agreement as your form of contract, clause 13.12 of the agreement states:

"If one or more individuals are specified as "Key Personnel" of the Contractor in Part 4 of Schedule A, the Contractor must cause those individuals to perform the Services on the Contractor's behalf, unless the Province otherwise approves in writing, which approval must not be unreasonably withheld."

Seek legal advice on this if you will be using a custom form of contract, or require changes to a corporate contract template, such as to the clause referenced above.

5.2.2.h How will proponents know what experience is being evaluated?

Be clear on the experience being evaluated. It could be organizational, individual, and/or a team's experience. If evaluating more than one of those groups, ask for this information in separate sections of the response guideline, so it is clear what is being evaluated.

5.2.2.i How can I encourage proponents to provide specific and relevant details about their experience?

Use clear language to describe what you are looking for. Avoid subjective words such as "similar" and "recent" and, if you do use any, define them. For example:

"Proponents should have three (3) or more years' experience within the past seven (7) years (as of the Issue Date) delivering services of a similar scope and complexity. Similar scope and complexity means:

- i. Providing services to a customer who has at least 100 discrete urban and rural locations.
- ii. Visiting each of the customer's locations at least once on an annual basis.
- iii. Delivering training to the customer's staff using two or more methodologies, such as but not limited to webinars, on-line guides, live meetings, classroom sessions, etc.
- iv. Delivering comprehensive reports that document the progress made at each office and make recommendations for further improvement”.

In addition, clear criteria help support the award decisions, as the ministry can demonstrate transparency in what was evaluated.

5.2.2.j 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 Issue Date” or “at least three years’ experience within the past x years of the Issue Date.” Do not evaluate any experience beyond the specified time frame.

When evaluating, score those who have more experience higher. For example, if you are asking for experience doing X in the past 5 years, and the proponent fully meets that requirement in all 5 years, they would earn 100% of the available points. If they had experience doing X for only 3 of the 5 years, they would earn 60% of the available points.

5.2.2.k Are there common pitfalls to evaluating years of experience?

Yes. The following are 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 requires three or more years’ experience, a proponent may state that a project beginning in December of 2023 and ending in January 2025 (14 months spanning three calendar years) meets this requirement. To be sure proponents will demonstrate three full years of experience, use months rather than years (e.g. 36 months rather than three years).

Simultaneous Projects: Proponents could have had simultaneous projects that meet the experience requirement. The RFP should explain how overlapping dates will be managed.

The following sample language can be adapted to explain how you will count years of experience.

If simultaneous experience will be counted only once for years of experience:

“When evaluating experience, dates that overlap will be considered only once. For example, if Project A was delivered from September 2022 to March 2024 (19 months) and Project B was delivered from April 2023 to March 2026 (36 months), the experience evaluated will be from September 2022 to March 2026, or 43 months overall.”

If you will count overlapping dates separately:

“When evaluating experience, dates that overlap will be considered individually. For example, if Project A was delivered from September 2022 to March 2024 (19 months) and Project B was delivered from April 2023 to March 2026 (36 months), the experience evaluated will be the sum of these projects, or 55 months even though that experience was gained within 43 months overall.”

5.2.2.l Are there alternatives to years of experience?

Yes. If you don't want to evaluate organizational or individual experience based on years of experience, you can evaluate based on the number of similar projects they have completed.

5.2.2.m How do I determine the approach for evaluating experience – years or projects?

Evaluating years of experience works well when the experience is gained over longer-term projects (e.g. application support and maintenance, nursing services, managing large projects, curriculum development and delivery, etc.). These types of contracts usually last several years and often include one or more full-time equivalents.

Evaluating projects may work better if the experience is likely to be gained working on short-term or multiple projects simultaneously (e.g. facilitation, consultations, website design, etc.).

5.2.2.n What should Appendix B include if the number of projects will be used to evaluate experience?

It should include the minimum number of successfully completed projects that would demonstrate the basic skills and abilities needed. Request only enough to allow the proponent to focus on the examples that best demonstrate their abilities.

Define what projects are deemed to be relevant or similar. Do not use “years of experience” in this definition: however, the definition could be a minimum length of time.

Following is an example of how to define relevant or similar projects:

“Proponents should have delivered two (2) or more projects within the past seven (7) years (as of the Issue Date) of a similar scope and complexity. Similar scope and complexity mean projects that included:

- i. Developing measures specific to the principles of prevention, early detection and intervention, and risk reduction that demonstrated reduced information security breaches on the Province’s workstations.
- ii. Completing the project in no less than four months, from initial start-up to final deliverables.
- iii. Managing no less than and 20 incidents on average in each 24-hour period over no less than a four-month period.
- iv. Using a team of no less than three individuals, including at least one individual with formal education in project management.
- v. Developing training curriculum that included instructional systems design skills and addressed information security awareness”.

5.2.2.o Should I specify the number of projects proponents should include to demonstrate experience?

Yes. It will make the evaluation easier if all proponents include a similar number of projects.

Request a set number of projects (e.g. the most recent four projects) to help to focus proponents on the most relevant ones. State clear consequences for not following these instructions, 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 benefit to this approach is that it defines how a proponent would score 100% of the points for experience. For example, if you request 6 projects within the past 7 years, a proponent who describes 6 projects that hit all elements of the required experience and were delivered within the time limit would score 100% of the available points.

5.2.2.p Should résumés be requested if individual resources will be evaluated?

No. Résumés vary from person to person, which can make them difficult to evaluate against set criteria. Instead of requesting résumés, develop response guidelines that will collect the information you want. This may include education and experience of the resource proposed.

5.2.2.q Do all RFPs evaluate experience?

No. There are situations where experience has already been confirmed in other ways. For example, a certification or licensing process may be rigorous enough that experience doesn't make much difference.

5.2.2.r Do I have to check references?

See response to [4.7.5a](#).

5.2.2.s How many references should I request?

How many depends on how much time you have, and what information you are seeking. Consider requesting an odd number of references, as this will prevent a tie.

5.2.2.t How do references impact the evaluation process?

In the RFP template, references are a pass/fail criterion. No points are associated to them, but a proponent could be excluded from consideration if it fails the reference check. However, if you are going to exclude a proponent due to a negative reference, seek legal advice from LSB.

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

No. If you have concerns about a pass/fail approach or want to incorporate a different approach, contact your ministry procurement specialist, PSD or LSB.

5.2.2.v Are there any specific reference requirements for high value contracts?

Yes. The [CPPM](#) requires internal supplier reference checks for any contract valued at \$10 million or more ([CPPM 6, policy 32](#)). If your procurement meets this threshold (including the value of

any options), refer to the [CPPM Procedure Chapter O](#) for more information on how internal reference checks work. Work with your ministry procurement specialist, PSD and LSB to plan how you will meet this requirement and modify your RFP to incorporate this type of reference check.

5.2.3 Approach

5.2.3.a What if I want to know about how a proponent will deliver the services?

You can add an Approach section to request information on how the proponent intends to deliver the services described in section 3 (scope) of the RFP. To do this, include a response guideline requesting the proponent provide information on their approach to providing the services (see 5.2.3b below).

When writing the requirements for Approach, describe all the deliverables expected from the contract. These can be tangible deliverables where the contractor gives something to the ministry (e.g. reports, presentations, surveys, etc.) and/or intangible deliverables where the contractor does something (e.g. firefighting services, counselling services, system support and maintenance, etc.).

TIP: When writing the deliverables, consider the acronym SMART, (Specific, Measurable, Achievable, Relevant, and Time-bound).

5.2.3.b How should the requirements for Approach be written?

If you include an Approach section, focus on the expected delivery outputs or minimum service levels. This will allow the proponent to be creative in their solutions.

Here are some alternatives for more prescriptive instructions:

- Instead of providing a step-by-step process on how to ensure quality deliverables, provide a Response Guideline for proponents to describe their process and explain how it will ensure quality.
- Instead of providing dates they must meet each milestone, provide a timeframe for all deliverables (e.g. a certain number of weeks or months from contract signing) and have proponents propose their milestone dates.
- Instead of suggesting a solution to an existing problem, explain the problem and let proponents propose their solution.

- Instead of stating how many resources are required for the services, describe what deliverables are expected and include a Response Guideline for proponents to propose who will be responsible for each, how many individuals will be assigned to the tasks proposed, and the overall timeframe when each will be complete.
- Instead of stating 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 to propose a daily schedule.

Other requirements might include the minimum number of clients the program must serve, or the minimum response time for a system help desk.

5.2.4 Subcontractor Information

5.2.4.a What is the Subcontractor Information table for?

Proponents will complete this section to identify the subcontractors whose experience they described in the proposal. Use this to ensure all subcontractors are named in the contract with the successful proponent.

Section 2.12 of the process rules in the RFP template state that, where applicable, the names of approved subcontractors will be included in the contract.

If you do not want to permit subcontractors, seek advice from LSB.

5.2.5 Price

5.2.5.a What is the purpose of the Pricing Rules and Requirements?

The Pricing section describes the rules that apply to pricing bid by proponents to help ensure the pricing bid by all proponents is evaluated on the same basis. This language cannot be changed unless LSB advises on or drafts the changes. Note: The only exceptions to this are pricing rule 3.1 (b)(vii), which may not apply to all procurements.

The response guideline under Price Collection includes space to describe what price or prices are being requested.

5.2.5.b How should travel expenses be addressed in Price?

If delivery of the services will require travel, state whether travel expenses are to be included in the price proposed or are reimbursable at a defined rate. See [CPPM 10](#) for the policies related to travel expenses.

5.2.5.c I'm not sure if I should disclose the budget for this contract. What are the benefits and risks of doing so?

The following are some options for disclosing the budget and evaluating price.

- **Do not include a budget:** With this option, proponents offer their best price and the ministry awards points for price. The lower the price, the more points awarded

Benefit: Proponents are encouraged to offer their best pricing as they have no guidance as to what price should be offered. This works well if price is heavily weighted in the RFP

Risk: If price is not heavily weighted, 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

- **Provide an estimated budget:** The estimated budget helps define the scope of the opportunity. Proponents offer a price to deliver the services based on the scope and the ministry awards points for price. Proposed pricing may exceed the budget, which may affect scoring, but the proposal would not be rejected for it

Benefit: Including a budget estimate can help proponents gauge the scope of the expected services and provide a proposal within the ministry's price range

Risk: Some feel that disclosing a budget could result in proposals being priced at or near the maximum budget. However, it is rare for the successful proposal to offer a price well below the budget, even when the budget is not disclosed

- **Provide a budget and not award points for price:** This can be managed in one of two ways:
 1. State that the price proposed must not exceed the disclosed budget (i.e. a mandatory requirement).

2. State that the contract will be for the disclosed budget, meaning that price is fixed.

Benefit: You can use this option to select the proposal that offers the greatest value for the set budget. Also, if you know the budget is not enough to cover all the services you want, you can allow suppliers to tell you how much of the services they can deliver within your budget.

Risk: You may end up paying more than needed, particularly if price was not worth any points.

If you will not be awarding points for price, seek advice from LSB on changes required to the template.

5.2.5.d Can multiple prices be evaluated with an RFP?

Yes. If you request multiple prices, decide whether each price will be evaluated separately, if the sum of each price will be used for evaluations, or if another evaluation method applies. For each price you request, provide a description of what is expected to be included in that price.

5.2.5.e How should the Response Guidelines for Price be worded?

In the subsection Pricing Collection, you will explain how the proponent is to provide price. The following are a few examples of wording you can use. Make it clear whether this pricing is inclusive or exclusive of any expenses.

- **Example 1:** Provide a 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 indicated.
- **Example 2:** Provide unit pricing for the services proposed. Unit pricing is to be inclusive of all costs and expenses unless otherwise indicated in this RFP.

When writing this Response Guideline, be sure to state what the unit is, such as an hourly rate or a daily rate based on a certain number of hours worked. You may want to include a mandatory requirement that the unit rate does not exceed a certain dollar amount.

- **Example 3:** Provide a 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.

5.2.5.f Why is there a separate Pricing Evaluation table?

Price is evaluated differently than other weighted criteria. Generally, prices are compared to find either lowest price or best value.

5.2.5.g What options are available for evaluating price?

Following are three options you can use to evaluate price.

1. **Comparative formula:** When awarding points for pricing, you can use a comparative formula where the lowest price gets all the allocated points and everyone else is scored based on the formula.

The most common formula is:

$$\left(\frac{\text{Lowest price of all proposals}}{\text{This proponent's price}} \right) \times \text{Points available}$$

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

The benefit of the comparative formula is that you have control over how much price will be worth. This is a common approach, and most suppliers are familiar with it.

This approach also works if you want to request both a single price and multiple prices. If you ask for multiple prices, apply the formula to each price requested (i.e. where the overall total points are allocated to the best price or divided among each individual price) or to an overall price that is derived from the individual prices. See the answer below to the question [How can multiple prices be evaluated?](#)

Following is an example of the wording you can use in the Pricing Evaluation section of Appendix B for this approach if you are requesting a fixed fee proposal:

“Only proposals that have met all mandatory requirements and minimum score(s) will be evaluated for price. The Province will evaluate price as follows:

$$\left(\frac{\text{Lowest price of all proposals}}{\text{This proponent's price}} \right) \times \text{Points available}”$$

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

This formula is consistent with the RFP template, so you do not need to seek advice from LSB.

2. **Price-per-point:** This approach only works if you will evaluate one price per proposal. This can be a single price proposed or where multiple prices are combined to a single price in the proposal for evaluation. For more information, see the answer to the question 5.2.5.j - [How can multiple prices be evaluated?](#). It does not work for multiple prices evaluated separately.

To find the price per point, evaluate all other sections of the proposal (e.g. Capabilities and Experience) and do not give any points for price. Next, divide the price by the total points awarded for the other sections. You will award the contract to the proponent with the lowest price-per-point.

The benefit of this approach is that proponents quoting high prices are less likely to be successful unless they score much higher in the other areas. This approach uses the “two-envelope” (or two electronic files) system, where price is not reviewed until all other evaluations are complete.

You will need to seek advice from LSB to modify the RFP template to accommodate this ([CPPM 6, policy 35](#)).

Here is an example of this approach with three proposals:

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

Proponent B would be the front runner as their price-per-point is the lowest. Seek advice from LSB on how the pricing evaluation rules will need to be modified. Do not assign points to price if using this option.

Lowest price meeting minimum scores: With this option, accept the lowest priced proposal that meets all mandatory requirements and minimum scores. This approach works well if you expect that all proponents who meet a minimal threshold will deliver the

services in substantively the same way. There is no advantage to paying more for essentially the same services.

Following is an example of wording you can use for this approach:

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

Like price-per-point, this approach uses the “two-envelope” (or two electronic files) system. You will evaluate all criteria other than price and only open the price envelope/files of proposals that meet the minimum scores. The proponent with the lowest price is the successful proponent. For this approach, set the minimum score high enough to ensure your requirements will be completely satisfied by those that meet the minimum. Seek advice from LSB on the modifications to the RFP template to accommodate this ([CPPM 6, policy 35](#)).

NOTE: Do not assign points to price if using this option.

5.2.5.h Do I have to evaluate price using a formula?

No. You can make price a mandatory requirement (e.g. must not exceed \$x) or a term of the contract (e.g. contract price will be \$x).

NOTE: If you use either of these approaches, you will not be able to exceed the budget disclosed in the RFP.

Following are examples of wording that could be used in the RFP if price will not be evaluated:

- **Mandatory Requirement:** “Proposed pricing must not exceed \$x per year.”
- **Term of the Contract:** “Price will not be collected or evaluated in the RFP. The maximum amount payable under the Contract will be \$x for all services described in this RFP.”

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.

As the RFP template requires a price evaluation, seek advice from LSB on the modifications required.

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

Yes.

5.2.5.j How can multiple prices be evaluated?

If requesting multiple prices, describe how the price will be evaluated. Here are three options that can be adapted to suit your needs:

Allocate points to each price: This approach works well when some prices are worth more than others. The total points available for price are distributed across each of the prices requested. For example, if price is worth 30 points, and you request 5 prices, the assumption is that those 30 points are evenly divided among the five prices (i.e. 6 points each), unless the RFP states otherwise. If you intend to divide the total points for price other than evenly, indicate that allocation in the RFP.

Following is sample wording that could be adapted for this option:

“Each price requested in this RFP will be evaluated separately. The points allocated to the Price section are divided as follows: [indicate how many points each price is worth]. The following formula will be applied to each price proposed:”

By using this option, it is possible for one proposal to have the lowest price in one category but not in all. For example, a single proposal could score full points in some categories (i.e. the lowest price), with lower scores in other categories where another proposal proposed a lower price.

Add the prices together: This approach works well if all prices are equally important, and the ministry intends to award the most points to the overall lowest price. In this case, each price is added together to determine the total.

Be sure to consider what will happen if not all prices are included in a proposal.

Appendix B of the RFP template contains the following rule at section 3.1(b)(vii):

“Entering the numerical figure of “\$0,” “\$zero,” or the like in response to a call for a specific dollar amount will result in the Proponent’s Proposal being rejected resulting in the Proponent being eliminated from the RFP competition.”

If you require changes to this rule, or if some prices collected are optional, seek advice from LSB.

Apply a pricing scenario: This approach works well if multiple prices are requested, and it would be difficult to divide the points in a way that fairly represents how much of each line item might be purchased. For this option, you would use a scenario representing the approximate purchases that may be made against the final contract. This scenario could be based on past purchases or on current plans. The scenario may entail heavy purchases of some items, with few purchases of others.

If you are using this approach, describe the scenario fully in the RFP. This is particularly important if it is based on past purchases to ensure all proponents have the same information as the incumbent contractor.

The following wording could be adapted:

“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.”

Seek advice from LSB to determine if any pricing rules need adjusting.

5.2.5.k Who should be named as the FOIPPA contact?

The FOIPPA contact can be the same as the Official Contact or someone designated to manage questions relating to FOIPPA. You must include either the name or a title of this individual and their email address. If you aren't sure who to name, contact your ministry procurement specialist.

6 Identifying and Advertising to Potential Proponents

6.a Do I have to post the RFP to BC Bid?

Yes, if your RFP meets the value thresholds for posting. Policy requires ministries to post opportunities to BC Bid if they are for services valued at \$75,000 or more, goods valued at \$10,000 or more and construction valued at \$100,000 or more.

BC Bid is the Province's site for procurement opportunities. Do not use any other site to post your opportunity.

The federal government links to all the provincial sites, so your opportunity will also be in the [Canada Buys](#) site.

6.b Can I limit participation to only invited suppliers?

Not unless the estimated value of your entire opportunity is under the applicable threshold (\$75,000 for services and \$10,000 for goods). See [CPPM 6, policy 30](#) on how to determine the value. If your opportunity is under the threshold, consider using a Non-Binding Request for Quotes rather than an RFP.

The RFP is designed to openly compete procurements on BC Bid. If you want to use it for select invitation, consult LSB.

6.c How long should the RFP be open?

Allow enough time to give interested suppliers a reasonable opportunity to assess the RFP and provide a proposal. The minimum posting time for an RFP is 27 calendar days provided the RFP meets these criteria: (a) it is posted to BC Bid, (b) all the solicitation documents are included when you post, and (c) you allow e-bidding or email submissions.

You may choose to post longer depending on the nature and complexity of the RFP, the extent of subcontracting anticipated, the time of year and other factors. Refer to [Sufficient time posting guidelines](#) for more information.

7 Ensuring the Integrity of the Request for Proposals Process

Provincial policy ([CPPM 6.3.2, policy 37](#)) requires, in part, that all suppliers be provided with information in a non-discriminatory manner which includes the information necessary for them to write a response.

7.a What questions can suppliers ask about an RFP?

Suppliers may request clarification of or changes to anything in the RFP. This may include terms and conditions, the evaluation criteria, or additional explanations about the ministry requirements. Supplier questions may help identify issues with the solicitation document that were not evident prior to its release, address requests or concerns suppliers may have, and improve the quality of the RFP itself.

7.b What is the process for responding to suppliers' questions about the RFP?

Suppliers are required to submit their questions in writing to the RFP's "Official Contact" before the Enquiries Deadline set out in the RFP (see the cover page of the RFP, and section 2.29 of the RFP process rules).

If the solicitation is being managed on BC Bid, all addenda are posted there.

Addenda should be posted or distributed in a PDF format. They should include both the question(s) asked and the ministry's answer(s). You may decide to answer each question as it comes in, or to collect multiple questions and answer them all at once. However, remember the time suppliers will need to consider the information in the addenda and to adjust their proposal accordingly.

NOTE: The Official Contact must ensure supplier identities and competitive details remain confidential in their responses. Revealing details like subcontractor names, proprietary equipment, and addresses can compromise supplier anonymity and their proposal's competitive edge. While questions may be slightly altered for privacy, they should stay true to their original intent.

7.c Can RFPs change after they have been released?

Yes. The standard terms and conditions in the corporate RFP template at section 2.22 provide the Province with the right to modify the terms of an RFP at any time prior to the Closing Date

and Time, and the right to cancel an RFP at any time prior to entering a contract with the successful proponent. Seek legal advice from LSB prior to exercising any of the reservations of rights in section 2.22.

No changes to the procurement process, as stated in the terms of the RFP, should be made after closing. If you need to change the RFP document after closing, speak to your ministry procurement specialist, PSD or LSB.

7.d Can suppliers ask to change requirements?

Yes, however, requirements should not be changed unless the change benefits all or most proponents.

7.e Can suppliers ask questions about an RFP by phone?

No, suppliers must submit questions in writing to the Official Contact either by using the “enquiries interface” in BC Bid or the email address specified on the cover of the RFP. See the cover page of the RFP and process rule 2.29. This ensures all interested suppliers receive the same information.

7.f What if a supplier submits a question close to the closing date and the response may impact others’ proposals?

You may receive an important question or become aware of new information close to the closing date. If the response will significantly impact proposals, post an addendum to extend the closing date to give proponents more time to address this new information.

7.g How are changes to the RFP communicated?

Any changes to the requirements or terms of an RFP posted to BC Bid must be posted via addenda or amendment. See RFP process rules 2.4 and 2.5, as well as the definitions of “Addenda” and “Amendment” in 2.1. Changes to the RFP that materially alter the underlying opportunity with significant or fundamental alterations will usually be required to be posted as Amendments. Clarifying questions and answers and anything less than a really material, significant change warranting an Amendment should be posted as an addendum. If you’re

unsure whether a change should be posted as an Addendum or an Amendment, consult with your ministry procurement specialist or PSD.

Interested suppliers are responsible for checking the BC Bid website to look for updates. Proponents can subscribe to BC Bid for a fee and set up a profile to ensure they are automatically notified of any RFPs, and related addenda, that match their profile.

7.h Can a proponent withdraw their proposal?

Yes, a proponent may withdraw their proposal prior to the RFP's Closing Date and Time, as permitted by RFP rule 2.20. Upon the Closing Date and Time, all proposals become irrevocable as set out in RFP process rule 2.7.

7.i Can the successful proponent back out if their plans change?

No. All proposals are irrevocable for 90 days, by default, as of the Closing Date and Time specified in the RFP (process rule 2.7). If a successful proponent chooses to withdraw their proposal after the Closing Date and Time but before that 90-day period expires, they will be considered in breach of contract (i.e. in breach of Contract A).

If a proponent states their intention to back out after they have been told they are the highest scoring proponent, contact your ministry procurement specialist, PSD or LSB for advice on next steps.

8 The Supplier Meeting

8.a What is a Supplier Meeting?

A Supplier Meeting is hosted by the ministry responsible for the procurement to provide suppliers with information about an opportunity. They are generally held virtually but can be in-person if required (e.g. a site visit to show suppliers the work environment). More than one supplier meeting can be offered to give suppliers options to attend and/or if there are multiple sites to visit.

Minutes or a transcript of the meeting must be made available to all, including those who were unable to attend, by posting to BC Bid via an addendum. Post this as soon as possible following the supplier meeting.

If you intend to hold a Supplier Meeting, you need to state that in the RFP. You must include the date, time, location and whether it is mandatory or optional. If the Supplier Meeting is mandatory, include this in the mandatory criteria section of the RFP.

TIP: If you will hold a virtual meeting, do not include the meeting details in the solicitation. Rather, include instructions for suppliers to email the official contact for the meeting invitation. This will help you track attendance.

TIP: Plan a little more time than you think you will need (e.g. two hours) to ensure the meeting is not rushed.

8.b Is a Supplier Meeting required?

No. Supplier meetings are optional; however, they can be effective if:

- The opportunity is complex.
- The opportunity is politically sensitive, with many individuals and groups interested in its outcome.
- Interested suppliers may benefit from a site tour of the Province-controlled facility where the services will be delivered.
- Many of the interested suppliers may not have participated in competitive procurement before and would benefit from basic instructions on how to respond.

8.c What should I consider if a Supplier Meeting permits both virtual and in-person attendance?

If some suppliers are not able to attend an in-person meeting, you may want to provide an option to join virtually. If you are thinking of doing this, consider the following:

- The room needs to be equipped with cameras and microphones to allow virtual attendees to hear and see everything.
- Suppliers should be held in a waiting room (an actual waiting room for those attending in person and a virtual one for those attending online) until the chair allows them in, so the procurement team can discuss any issues or concerns prior to the meeting starting without any suppliers being present (if this is not feasible for those attending in person, do not discuss anything confidential when the suppliers are present).
- Assign someone to monitor the virtual attendees so they are recognized if they raise their virtual hand or type a question in the chat.
- Repeat the questions asked by those attending in person, so online attendees can hear it.
- Pause regularly to give those attending virtually a chance to catch up and ask their questions, particularly if they are using the chat feature.

8.d When should the Supplier Meeting be held?

Schedule the meeting for a week or two after the RFP is issued and at least two weeks before the closing date.

8.e How should the Supplier Meeting be conducted?

Contact your ministry procurement specialist or PSD for advice on how to conduct supplier meetings.

8.f Is attendance at a Supplier Meeting mandatory?

Attendance at the meeting should be optional unless mandatory attendance is necessary (e.g. a site visit is needed to show conditions that could not be described adequately in the RFP). If attendance is mandatory, state this on the RFP cover page and in the mandatory criteria section.

If an in-person Supplier Meeting is mandatory, you must track attendance. You can do this with a sign-in sheet that identifies each proponent's organization. This sheet will serve as proof of meeting this mandatory requirement.

TIP: When deciding whether to make the Supplier Meeting mandatory, consider the consequences if only one supplier attends. This would seriously compromise the competitiveness of the RFP, as this one supplier would know they are the only supplier eligible to participate.

8.g Is it necessary to record minutes at the Suppliers Meeting?

Yes. Minutes or a verbatim transcript of the Supplier Meeting are required. See the cover page of the RFP under the Supplier Meeting section.

If you hold the meeting virtually, the application's record feature (e.g. Teams) will provide a transcript. If you want to record the meeting, the recording will become a record subject to FOI and record retention rules. Contact LSB as the template may need to be updated to permit recordings.

8.h How should questions be raised and answered at a Suppliers Meeting?

The RFP template has language asking suppliers to submit complex questions or, if they want to ask a question anonymously, in writing before the meeting. This will give you time to prepare an answer. At the meeting, read the questions and answers out to the group.

If you get a question you can't answer at the meeting, defer it and provide an answer afterward in an addendum.

8.i Who should attend from the ministry?

The Official Contact should be at the meeting to reinforce their role as the "gatekeeper" of RFP information. The meeting can be chaired by a ministry employee or a representative from PSD acting on the ministry's behalf.

Others should include those who understand the requirements well and can answer questions related to the program or services, and at least one person who understands the procurement process and can answer related questions.

9 Receiving Proposals

9.a What is important to know about receiving proposals?

Proposals must be received before the Closing Date and Time in the manner allowed by the RFP (e.g. email) to be considered. See RFP process rule 2.3.

The date and time each proposal arrives at the Closing Location should be recorded as proof of whether the proposal arrived on time. If allowing eBids through the BC Bid website, the system will record this date and time. If allowing emailed submissions, use the date and time the email was received. If allowing hard copy submissions (i.e. hand delivery or courier), date and time stamp each submission as it arrives.

It is important to keep proponents' documents and communications together and organized throughout the process. BC Bid will keep all proposals in the system until after closing. If allowing emailed submissions, keep all emails in one folder and, if allowing hard copy submissions, record the names of the proponents as their proposals are received and securely store all proposals together.

TIP: The person who handles the submissions should not be on the evaluation team. Proposals should not be opened until after the Closing Date and Time and the evaluation handbook has been finalized.

9.b Is it necessary for every proponent to sign their proposal?

Yes. Section 2.2 of the RFP template requires it.

For proponents who submit proposals via BC Bid, they must click the "I Agree and Submit" button to submit their proposal, which constitutes their signature.

9.c What if a proposal has missed a mandatory requirement?

If a proposal misses one or more mandatory requirements, it cannot receive any further consideration. Designate a person to check mandatory requirements after the Closing Date and Time. If one was missed, use the evaluation handbook to document it and do not forward to the evaluation team. The proponent can be informed immediately or after you announce the successful proponent.

9.d What if a proposal arrives late?

A late proposal cannot be considered. The BC Bid system will not accept a late proposal. For late hard copy proposals, take a photocopy of the envelope or package with the date stamp visible, and return the package (unopened if possible) to the proponent. For late email proposals, you may open the email but do not open the proposal.

9.e What if I'm not sure if the mandatory was met?

If there is any doubt whether a submission has met a mandatory requirement, consult with your ministry procurement specialist first, then PSD or LSB.

9.f Can I contact a proponent to ask questions about their proposal after closing?

You may ask proponents for clarification about their proposal after the Closing Date and Time under limited circumstances. The RFP at process rule 2.22(d) permits clarification on non-material administrative matters (i.e. a matter that is not scored). As this involves exercising a reserved right, seek advice from LSB prior to exercising it.

10 Evaluation of Proposals

10.a Who should be on the evaluation team and what are their roles?

[CPPM 6, policy 40](#) states that the procuring entity (e.g. ministry staff) must participate in the evaluation process. The evaluation team may be a combination of ministry staff and contractors, but it may not be fully contracted out.

Here are some tips to build your evaluation team:

- Consider the team size. Include at least three people, with at least one from the ministry issuing the solicitation. The size will depend on the complexity of the project, but three or five members usually works best. An odd number of evaluators will help you avoid a tie. Note that larger teams may take more time to complete the process.
- The team must be knowledgeable about the procurement and what is being purchased. They must also be unbiased in their evaluations. The team could include: the program manager, a technical person, a financial person, a client representative and/or a procurement representative from the ministry or PSD.
- Be sure the team understands the time commitment. This will depend on the number of proposals and the time needed to evaluate them. It could include time to evaluate proposals and demonstrations and working with the team to reach consensus.
- Plan for a backup evaluator. who understands the procurement, in case a core evaluator is not available.
- Evaluation teams should not include individuals who report to another evaluation team member. If this is unavoidable, at least one neutral party (i.e. outside of the reporting relationship) should be part of the team to avoid the possibility of or perception that the supervisor is influencing the team's decisions. You may not want to include executive directors (or above) on the evaluation team, as this can lead to scheduling challenges.
- You can include contractors or staff from other ministries or government organizations. Contractors on the evaluation team Must not be affiliated with any proponent and must have an active contract with the Province. This requires them to keep information about the procurement confidential and obligates them to disclose any conflicts of interest. Contact LSB if you need a custom agreement.
- Have a plan B. When planning the evaluation, consider holidays, elections, emergencies, etc. Have a backup plan in case something goes amiss.

10.b Where can I find information about conflicts of interest?

See the Province's [Standards of Conduct, Conflict of interest section](#) for information on actual or perceived conflicts of interest. The [Procurement Practice Standards](#) also contain additional information regarding conflicts of interest as it relates to procurement.

10.c What should be done about real or perceived conflicts of interest?

If an evaluator faces a real or perceived conflict of interest, they should be excused from the evaluation team and replaced. This would occur if there is a submission from:

- A proponent with whom an evaluator has a financial interest. For example, a family member's business, a company where the evaluator owns significant shares, or where an evaluator's immediate family member works
- An evaluator's friend
- A non-profit organization that an evaluator is significantly involved with

If a proponent faces a conflict of interest, they should be informed of their ineligibility to participate as, or in affiliation with, a proponent. For example, a submission from a proponent who was involved in the development of the RFP. In this case, the proponent will be seen as having information that was not available to all proponents.

10.d Must a proponent disclose a conflict of interest?

Yes. See the RFP process rule 2.11. If you receive any proponent questions or disclosures related to conflicts of interest, unfair advantage or bias, seek advice from LSB.

10.e Can we require proponents to do a demonstration?

Take extra care if you want to include a demonstration in your procurement. Consider involving LSB early for advice as the RFP template may need to be altered as per [CPPM 6](#).

Demonstrations are inherently susceptible to variation, unpredictability, and subjectivity. If your procurement does need a demonstration to conduct a full and appropriate evaluation, script it as much as possible and avoid leaving it open-ended.

10.f If we require proponents to do a demonstration, can we record it for evaluation purposes?

Recording presentations is not encouraged by LSB. Instead, consider requiring your evaluators to make their decisions carefully, but finally, in the moment. Note that any records created may be subject to FOI and retention schedules and can be pulled into litigation if there is a dispute.

10.g When should the evaluation team meet?

The team should meet early, and some members of the team should be involved in the development of the RFP and evaluation handbook. If this is not possible, the team should meet prior to the RFP closing to review the evaluation criteria and process. The team may also make necessary changes to the handbook (e.g. clarifications to the process—the team must avoid being influenced by proposals, as they finalize the handbook).

Once the RFP closes, the evaluation team will need time to evaluate proposals individually. Schedule the consensus evaluation meeting on a date that allows for that.

10.h What should evaluators put in the evaluation handbook?

All RFPs require an evaluation handbook to document the team's findings.

During their individual evaluations, evaluators should enter comments that support their scores. These comments should be fact-based and reference only the information in the proposal.

The final handbook should contain enough detail to support the team's decisions. It will provide the information needed for debrief meetings. It may also be referenced during the contract finalization if the ministry needs to clarify aspects of the proposed approach.

10.i How is the evaluation handbook developed?

Develop the handbook using the mandatory and weighted criteria outlined in the RFP. The handbook may expand on the criteria in the RFP but cannot add any new or undisclosed ones.

The handbook will need to identify what each Response Guideline is worth (i.e. its weight) from the total points available for that section. For example, if the RFP had five response guidelines in the Capabilities section worth a total of 30 points, these points would be divided among the five response guidelines. Points may be divided evenly ($30/5=6$ points each), or they can be

distributed differently depending on their importance. The total points in the evaluation handbook must equal the total points identified in the RFP.

If a single response guideline addresses a lot of information, the evaluation handbook may have sub-sections each with an allocation of points.

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

NOTE: Do not change your evaluation criteria after the proposal submission deadline. If you do make changes to criteria, the change must be declared in an addendum before the RFP closes. Be sure the evaluation handbook is consistent with the RFP and its addenda.

For more guidance on creating evaluation handbooks, contact your ministry procurement specialist first, then PSD for assistance.

10.j What is the process for evaluating proposals?

Evaluations are done in two steps – individual evaluations followed by consensus evaluations.

Individual Evaluations: Evaluation team members evaluate each proposal on their own, using the evaluation handbook to document what they find (each evaluator will have one handbook for each proposal). They should include their scores, rationales for those scores and page numbers where the pertinent information was found in the proposals.

TIP: Comments should be fact-based, with supporting facts for any opinions expressed. Keep in mind that evaluation documentation, including individual notes, are provincial records and may be subject to a freedom of information request pursuant to the *Freedom of Information and Protection of Privacy Act*.

Evaluators should always compare each proposal against the evaluation criteria rather than against each other.

Evaluators should not discuss the evaluation of submissions during their individual assessments to avoid influencing each other. Someone who is not an evaluator but has a good understanding of the RFP and procurement generally should be designated as the contact for evaluator questions.

During individual evaluations, the evaluators should evaluate all proposals completely, even if they feel the proposal will not be successful for any reason. This approach has the following benefits:

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- If one evaluator does not feel a proposal meets the minimum required score in one area, they may stop evaluating that proposal. However, if the others score it higher and the team decides the proposal scored high enough to pass, the first evaluator will require evaluation notes on the entire proposal to ensure the fairness of the process.
- Even if the team collectively determines that the minimum score is not met, individual notes on the entire submission can be used to provide informal feedback during a debrief.

Consensus Evaluations: Hold the consensus evaluation soon after the individual evaluations are completed. At these meetings the team discusses each section of the proposals, agrees on scores and what supporting comments to include. These consensus discussions will determine the results of the evaluation.

Scores and notes in individuals' workbooks should not be changed during the consensus process.

If consensus cannot be reached on a particular point, use the average of the evaluators' scores for that element, and include relevant comments.

If a minimum score applies and is not met in the consensus process, the process for that proposal ends. The proponent cannot be successful without meeting all minimum scores. To save time, start with the section(s) that have minimum scores.

Once the consensus evaluation is complete, all evaluators should indicate their agreement with the results. This can be done via email or by signing a hard copy of each final consensus evaluation handbook. Store the full consensus documentation, including individual and consensus notes and agreements with results, in the procurement file.

10.k Why is it important to document the evaluation?

Ministries must document the rationale for ranking Proponents ([CPPM 6, policy 42](#)). This supports the Province's decision making.

All proponents are entitled to a debrief ([CPPM 6, policy 43](#)), and ministries require documentation to provide factual, detailed feedback.

10.l Can evaluators consider what they know about a proponent?

Evaluators can only consider the information provided in the proposal.

10.m Is the same evaluation methodology used for price?

No. Price should be evaluated the way your RFP described. Refer to section [5.2.5 \(Price\)](#) for the options available.

If price is evaluated as a mathematical formula, two evaluators can manage this. They should independently calculate the score for price and if their results match this can be considered the final pricing score. If any scores do not match, the two team members should find out why and correct the problem.

Only proposals that meet all mandatory requirements and minimum scores should be evaluated for price.

10.n Can the evaluation process be changed after posting the RFP?

If the RFP has not yet closed, you can change how the weighted criteria (including price) will be evaluated. However, this would need to be stated in an addendum.

Once the RFP has closed, you cannot change any of the evaluation methodology described in the RFP.

10.o How should scoring work?

You will need to develop a scoring guide that describes how criteria are weighted. The weights you decide on should be reflected in the evaluation handbook. Seek advice from your ministry procurement specialist first, then PSD on how to develop the scoring guide for the evaluation handbook.

10.p When should references be checked?

The RFP template section 7.5 specifies that a reference check takes place once a successful proponent is identified. Refer to section [4.7.5 \(Reference Check\)](#) for more information.

10.q Does the evaluation always identify a successful proposal?

Usually, but not always. You must award the contract to the proponent whose proposal has met all mandatory criteria and minimum scores (if any) and achieves the highest rating. If none of the proposals meet these requirements there will be no successful proponent.

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The RFP template section 2.22(a) gives the Province the right to cancel the RFP without making an award. For example, if the highest ranked proposal is over budget and no additional funding is available. If you decide to cancel the RFP, you will need to inform the proponents. This involves exercising a reserved right, so seek advice from LSB prior to cancelling the RFP.

10.r Should I create a summary of the full evaluation?

Yes. A summary of the evaluation handbook can be a helpful reference for how each proponent scored. Following is a sample template of a summary:

Sample Scoring Summary for Proposals

	Weighting	Available Points	Minimum Score	Proponent A	Proponent B
Mandatory Criteria					
In English		Yes/No			
Received at closing Location before Closing Date and Time		Yes/No			
Complies with response delivery submission method requirements		Yes/No			
Contains a signed Submission Declaration Form (if email or hardcopy submission)		Yes/No			
Contains a prepared Appendix B, or form substantially similar		Yes/No			

Weighted Criteria	100%	200			
Capabilities	40%	80			

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	Weighting	Available Points	Minimum Score	Proponent A	Proponent B
Organizational Experience		50			
Key Personnel Experience		30			
Approach	25%	50	30		
Implementation Plan		30			
Quality Control Processes		15			
Transition Plan		5			
Pricing	35%	70			
Lowest price of all proposals divided by this proponent's price, multiplied by the points available					
TOTALS	100%	200			

11 Notifying Proponents

11.a Should all proponents be notified of the result?

Yes. [CPPM 6, policy 43](#) requires prompt written confirmation of each proponent's ranking after the completion of the evaluation. It also requires you to offer proponents feedback, usually a scripted debrief, on the evaluation of their proposal after the contract is signed.

Results should be announced to successful proponents first.

If a contract cannot be signed promptly (e.g. within 30 days), the unsuccessful proponents should be advised of their ranking with final notification of the result once the contract is signed. If it looks like there could be issues finalizing with the lead proponent, then correspondence with the next-highest-scoring proponent might include a note to remind them that their proposal may still be considered if contract finalization efforts are unsuccessful.

11.b What if there is no successful proponent?

If all proposals were unsuccessful (i.e. missed mandatory requirements or minimum scores), proponents should be notified of this result and debriefs offered. If the ministry intends to re-issue the solicitation, the notifications should state that proponents should monitor BC Bid for future opportunities that may interest them.

11.c Are any other notifications required?

Yes. Policy requires that any solicitation posted on BC Bid must announce the contract award decision on BC Bid ([CPPM 6, policy 51](#)). Refer to the "contract award summary" tab on [Step 7 Notify and Share](#) of the BC Bid ministry buyer guide for instructions on how to do this.

12 The Contract

12.a Can changes be made to the corporate contract templates?

No changes may be made to the terms and conditions in the corporate contract templates without advice from LSB ([CPPM 6, policy 44](#)).

The corporate contract templates are designed for a wide variety of contracts for services. This contract form includes the Province's terms and conditions related to insurance, indemnities, rights to intellectual property, etc. 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 (e.g. Schedule D Insurance, Schedule E Privacy Protection, and Schedule G Security).

If none of the corporate contract templates are appropriate, engage LSB to develop an alternative contract ([CPPM 6, policy 44 and 45](#)). The RMB and the Government Chief Risk Office will advise on any questions related to the insurance requirements and any changes a proponent requests to the indemnity requirements.

12.b How should the ministry plan for contract finalization?

Preparing for contract finalization is critical. Contact your ministry procurement specialist first, then PSD or LSB to help you develop a strategy.

The following tips may help you plan for contract finalization:

- Supplement the general industry information that was gathered in the planning stage of the RFP with information specific to the successful proponent, such as the proponent's other major clients.
- Review the successful proponent's evaluation document and identify areas where additional detail is required for the contract.
- Provide the successful proponent with a draft of the contract before the first meeting. This draft should include all relevant information from the RFP and their proposal, as well as comments on areas where clarification or additional detail is required.
- Consider the best alternative to no agreement (BATNA) with the proponent. If you absolutely require this contract and have few or no other options, you will be at a disadvantage as you won't have much leverage when finalizing the contract.

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- Confirm the authority of those responsible for finalizing the contract – both on the proponent's and the Province's behalf. These individuals should have authority to approve the contract or to withdraw without a signed contract.

Here are some tips as your contract team goes into the finalization process:

- Plan to take a collaborative approach.
- Aim for a contract that satisfies both parties.
- Remember that you are representing the Province.
- Avoid being defensive or aggressive.
- Give the other party plenty of opportunity to speak.
- Take time to consider all information presented.
- Identify and build on areas of common interest.
- Clearly document and confirm areas of agreement so they do not get revisited later.
- Be willing to leave the table to conduct research as necessary. For example, if a proponent states that everyone else in the Province is getting the same deal, you will want to confirm this before the ministry signs a contract.

12.c How much detail should be included in the final contract?

Whatever is agreed between the successful proponent and the Province must be explicitly written in the contract. For example, if the proponent has agreed to assign certain staff to the contract, the contract should identify them by name.

Deliverables should be SMART (Specific, Measurable, Attainable, Relevant, and Time-bound). This will help clarify expectations and avoid disagreements about whether the contractual obligations were met.

TIP: If possible, avoid using interim documents or agreements, such as Letters of Intent or Memoranda of Understanding. Ideally, the only written agreement will be the final contract.

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

No. Never incorporate an idea from an unsuccessful proposal into the final contract with another proponent or share information from one proposal with other proponents.

12.e What if the successful proponent requests changes to the contract?

By submitting a proposal, proponents agree to the terms and conditions of the RFP, its appendices and addenda (see section 2.2 of the RFP template).

While material changes cannot be made, you may be able to accommodate minor edits for clarity.

If the successful proponent wants to change any terms and conditions, or you are not sure if a change would be considered material, seek advice from LSB ([CPPM 6, policy 44](#)).

12.f Can the Province sign the contractor's form of contract?

The contractor's form of contract can be signed if Option 3 in Appendix A is used and if certain additional conditions are met. The Province and the successful proponent will need to finalize any contract terms and conditions that were not included as select terms in the RFP. LSB will be required to advise on this form of contract ([CPPM 6, policy 45](#)). There may be terms and conditions that a proponent wishes to include but that the Province cannot accept, which is why Option 3 carries with it some uncertainty.

If the RFP included a government contract format or terms and conditions that would be included in the contract (see Option 1 and Option 2 of Appendix A), the successful proponent would have agreed to these terms and conditions by submitting a proposal and cannot then propose its own form of contract during the contract finalization stage.

If the successful proponent insists on changing the terms and conditions or using its own form of contract, contact LSB for advice.

12.g What else is needed when finalizing the contract?

Some contracts will require additional information to be collected as evidence that the contractor complies with certain contract requirements. These may include but are not limited to:

- Proof of insurance – see Ministry of Finance [Risk Management Resources](#)
- [Tax verification letter](#)
- [Clearance letter](#) from WorkSafeBC
- Proof of valid certification(s), if applicable
- Proof of a key personnel's credentials, if applicable

12.h How should contractor performance be evaluated?

When planning the RFP, consider evaluation criteria for contractor performance. These should be included in the RFP and the resulting contract.

To evaluate contractor performance, you can conduct site visits, document reviews or audits, such as testing, surveys, system performance data, etc. Document any issues or deficiencies, share these with the contractor and develop clear plans for resolution. You should hold regular meetings with the contractor even if the performance of the contract is going well, as these give the contractor an opportunity to voice any issues or concerns and for you to provide feedback on their work.

12.i Do I need to do an evaluation at the end of the contract?

Yes. Every contract valued at \$75,000 or more requires a written evaluation of the contractor's performance ([CPPM 6, policy 62](#)), and it's good practice to evaluate contractor performance regardless of the contract value. When documenting the contractor's performance, the [Post-Contract Evaluation Form](#) may be helpful to capture concise information. See the [Procurement Practice Standard](#) for more information.

You may also wish to evaluate your internal team's performance. This could include lessons learned and documenting how to avoid issues or problems that occurred during the RFP or contract management process.

12.j What else do I need to do at the end of the contract?

Consider what you might need from the contractor when the contract ends, such as documentation, transition services, knowledge transfer, etc. Be sure to include these requirements in the contract to ensure you get what you need when the contract ends.

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When your contract expires and the final invoice has been processed for payment, you will need to close the contract in the Corporate Financial System. This can be done by notifying your financial administrator directly, or your contract support staff.

13 Debriefing

13.a What is the purpose of a debriefing meeting?

Debriefing meetings provide unsuccessful proponents with the opportunity to learn about their proposal's strengths and weaknesses. Providing feedback fosters positive relationships and can help a proponent better understand the Province's RFP process and prepare successful proposals for future competitions. Debriefs are also an opportunity for you to demonstrate the transparency of your RFP process.

Debriefs are not an opportunity to change results or to re-compete the opportunity.

13.b Who should attend the debrief meetings?

Debriefs are private meetings between the Province and each proponent that requested one. Proponents can choose who they would like to attend from their organization. At least one evaluator should attend in addition to someone who can answer questions about the ongoing plans with the resulting contract - this could be the same person, although ideally, at least two people from the Province should attend.

TIP: When organizing debriefs, ask proponents to identify who they intend to have attend from their organization. If a lawyer is included, contact LSB. You should not attend a meeting with a proponent's lawyer without a BC Government lawyer also being present.

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

The meeting is unlikely to result in issues or complaints with the process if you followed the evaluation process defined in the RFP.

Although a good RFP process cannot prevent issues and complaints from arising, it does provide the basis to explain and defend its process. Refer to the information on proponent concerns and complaints in [Understand government processes](#) for more information.

13.d When should debriefs be scheduled?

Provincial policy requires that debriefs take place after the contract has been signed ([CPPM 6, policy 43](#)); however, proponents may be notified of the results earlier.

13.e How should I prepare for a debrief?

Debriefs can be offered in-person at a location determined by you, by telephone or by teleconference. See process rule 2.16 of the RFP template.

Debrief meetings typically take between 10-45 minutes but could take longer if required. When scheduling, include time between each debrief to allow it to go over its allotted time, if needed, and to prepare for the next one.

Documents you may need for the meeting include a prepared script for the debrief, the solicitation document (including addenda), the detailed evaluation of this proponent's proposal, a summary of all proposal results, and anything else that may be referenced.

TIP: Proponents appreciate being given a summary of their own detailed evaluation. Provide this document just before or during the meeting to allow the proponent to review and prepare questions they may have from it.

In addition, have the website addresses for initiating [Freedom of Information and Protection of Privacy requests](#), the [Understand government processes](#), and [vendor complaint information and contacts](#) ready in case you need to direct the proponent to that information. Provide these websites if a proponent indicates that they would like more information than you have shared or if they feel the evaluation process was flawed and/or unfair.

13.f How should a debrief meeting be conducted?

A debrief meeting script should be prepared in advance. Although the format for debriefs can vary, the following is a typical agenda:

- Introductions
- Purpose of the debrief
- Description of the evaluation process used
- High level overview of results (this should address overall score and scores for major categories)
- Detailed review (can be to the level requested by proponent and could include a description of the summary document being provided)

You may want to take notes on what was discussed during the debrief and save them in the solicitation file.

Your ministry procurement specialist or PSD can help prepare a debriefing script and provide advice on debriefs.

13.g What information can I provide in a debrief?

Refer to the [Guidance for the Release of Information or Documents Related to Competitive Procurement Opportunities](#). This document contains information on what you can routinely release if asked, and what requires a formal FOI request.

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

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

If a proponent asks for the completed evaluation handbook for their proposal, advise them to make a formal FOI request. For other requested information, see [Guidance for the Release of Information or Documents Related to Competitive Procurement Opportunities](#).

13.i What advice should the ministry provide to unsuccessful proponents?

During the debriefing, refer proponents to the information available on [BC Procurement Resources](#). This includes information on how to [Sell to government](#). Encourage proponents to continually monitor BC Bid for opportunities that may be of interest to them.

13.j What if the proponent has concerns with the process of the solicitation?

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 [vendor complaint information and contacts](#) webpage ([CPPM 6, policies 66 – 70](#)).

14 Document Retention and Information Sharing

14.a How long should RFP files be kept?

[The Core Policy and Procedures Manual, Chapter 12](#) defines the expectations for records management in the Province. The ARCS ([Administrative Records Classification System](#)) usually requires that all records created as part of a procurement and contract process, be retained for seven years after the contract ends. See [ARCS Section 1070](#) for instruction specific to procurements and contracts and the types of documents that must be retained. ARCS 1070 does not cover the management of certain types of contracts. The 4 categories of contracts not addressed by 1070, as listed on the ARCS webpage, may be covered in the ORCS ([Operational Records Classification Systems](#)) of the specific ministry or program area. Speak to your ministry records officer for more information.

14.b What documentation should be retained on file?

See ARCS section 1070 regarding documents that have to be retained and speak to your ministry records officer about any additional records that your ministry or program area may also require to be retained that may be covered in the ORCS.

14.c 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.

See [Guidance for the Release of Information or Documents Related to the Competitive Procurement Opportunities](#) for more information.

Advice on releasing information during a specific RFP process is available from your ministry procurement specialist.

15 Contacts

Refer to [Buyer supports](#) for a list and description of procurement supports available to ministries.

Also refer to the list of ministry procurement specialists to find support specific to the ministry.

16 Glossary and Definitions

Refer to the glossaries and definitions provided for the [Core Policy and Procedures Manual](#) and [BC Bid](#).

17 Quick Links

- [BC Bid](#)
- [BC Procurement Resources](#)
- [Core Policy and Procedures Manual, Chapter 6 Procurement](#)
- [Core Policy and Procedures Manual, Chapter 12 Information Management and Information Technology Management](#)
- [Freedom of Information and Protection of Privacy Act](#)
- [Privacy Impact Assessment](#)
- [Security Threat and Risk Assessment](#)
- [Office of the Comptroller General](#)
- [Procurement Services Act](#)
- [Procurement training and development](#)
- [Procurement Services](#)
- [Government Chief Risk Office](#)
- [Solicitation processes and templates](#)
- [Standards of Conduct for Public Service Employees](#)
- [Trade agreements](#)
- [Vendor Complaint and Review Process](#)