



# **PROPONENTS' GUIDE:**

## **HOW TO RESPOND TO THE SHORT-FORM REQUEST FOR PROPOSALS ("SRFP")**

Shared Services BC  
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# 1. INTRODUCTION

Vendors have expressed concerns regarding the complexity of the Request for Proposals process. In response, the Province of British Columbia has developed a two page Short-form Request for Proposals (SRFP) for many contract opportunities that are valued no more than \$250,000 per year, on average.

## 1.1. Purpose of this Guide

This Guide is intended to assist vendors to understand how the SRFP works, and helps to explain how they can respond to SRFP opportunities. Following the information and suggestions in this Guide will help proponents to present their proposal(s) and related information in an effective manner.

## 1.2. SRFP Rules

All competitive tendering processes have rules (also known as the terms and conditions) that identify how the process will work (“SRFP Rules”). The SRFP Rules also contain important definitions for terminology that is used in the SRFP process. The SRFP Rules are available on a website and can be found [here](#).

**Proponents must read and agree to be bound by the [SRFP Rules](#) BEFORE submitting a proposal to any SRFP.** Therefore, it is extremely important to read and fully understand the SRFP Rules.

## 1.3. Components of the SRFP

All SRFPs will include at least two documents: the SRFP itself (which includes by reference the SRFP Rules, accessible through a web link), and the corresponding smart form, the Appendix A SRFP Proposal Form. The SRFP describes what is being purchased, and the SRFP Proposal Form is the document that proponents fill out to respond to the SRFP. Proponents must use the SRFP Proposal Form for their proposals, as it has been designed to work specifically with the SRFP and will ensure that proponents provide complete and pertinent information.

## 1.4. SRFP Terminology

In addition the terminology defined in the SRFP Rules:

**Proponents** are vendors who respond to a Short-form Request for Proposals (SRFP).

The **successful proponent** is the proponent who is selected through the SRFP to enter into a contract to supply the goods and/or services required.

A **contractor** is a vendor who has signed a contract to provide goods and/or services under the terms and conditions of an agreement with the Province.

# 2. SHORT-FORM REQUEST FOR PROPOSALS (SRFP)

The SRFP and SRFP Rules contain information that is crucial to the process and proponents should ensure they understand this information to avoid their proposal being excluded from consideration. Questions regarding the SRFP process should be sent in writing to the Government Contact at the e-mail address/fax number indicated in the SRFP.

The following sections explain the information contained within the SRFP.

## 2.1. Closing Time

The SRFP includes the mandatory requirement for proposals to be received at the closing location described in the SRFP before the closing date and time (known as the Closing Time in the SRFP). **Any proposal that is received at or after the Closing Time will be rejected.**

## 2.2. Closing Location

Depending on what is expressly specified in the SRFP, the closing location for the receipt of proposals may be a physical address, and/or electronically through the [BC Bid website](#) (i.e. an eBid<sup>1</sup>) and/or emailed to the named Government Contact. If emailed submissions are permitted, refer to the [Guidelines for Vendors for Submissions via Email](#) before deciding on this delivery mechanism to fully understand the risks of sending proposals via email.

Only proposals received at the identified closing location before the Closing Time in accordance with the SRFP will be accepted.

## 2.3. Government Contact

Every SRFP will include the name and contact information of an individual who has been designated to respond to proponent inquiries. **Do not rely on any information that is not received through the named Government Contact.** See section 2.6 of this guide for more information on the role of the Government Contact.

## 2.4. SRFP Section 1: Contract Services

This section describes the scope of the services that are being purchased through the SRFP process. It may include references to websites and/or to appendices that have a direct relevance to the services required.

## 2.5. SRFP Section 2: Contract Format

All SRFPs will incorporate a contract substantially in the form of one of the General Service Agreements ([GSA](#)) that is effective the date that the SRFP is issued, or a customized provincial contract specific to a ministry or a service. The SRFP will state what form of contract applies. When submitting a signed proposal in response to an SRFP, **proponents are agreeing to enter into a contract in substantially the same** format as that identified in this section of the SRFP, if they are successful. Proponents will **not** have the option of negotiating changes to the form of contract.

## 2.6. SRFP Section 3: Questions

If a proponent has any questions about an SRFP, these questions are to be sent in writing by e-mail or fax to the Government Contact. At the discretion of the Province, answers to questions received will be posted as addenda to the SRFP on [BC Bid](#) (or sent directly to proponents if the opportunity is not posted on BC Bid), to ensure that all proponents are receiving the same information at the same time about the SRFP. For those opportunities that are on BC Bid, **proponents are solely responsible to check the BC Bid website for any addenda that may have been posted.** The Province will not contact an individual proponent directly with an answer to their question without providing the same question and answer to all proponents.

Questions can relate to the information requested in proposals, the services described, the minimal expectations of the ministry, the clauses contained in the contract format identified in the SRFP, the format of proposals, etc. Proponents are encouraged to ask questions if there is any uncertainty about the requirements of the SRFP.

## 2.7. SRFP Section 4: Requirements for Proposals

This section references the SRFP Proposal Form for a description of what is being sought, and what should be included in proposals. Proponents **must** use the SRFP Proposal Form for their proposals; this is a mandatory requirement of the SRFP. If any other format is used, the proposal will not be considered or evaluated. As the SRFP Proposal Form is a smart form, proponents will not have the option of changing wording or formatting outside of the fields that they are to complete. See section 3 of this Guide for more information.

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<sup>1</sup>. Refer to [eBid Service Registration](#) and [Submit an eBid](#) for more information on e-Bidding

## 2.8. SRFP Section 5: Mandatory Requirements

The mandatory process requirements for all SRFPs are stated in the online [SRFP Rules](#) (see section 1.2 of this guide). Proponents are strongly encouraged to review these requirements and satisfy themselves on how to meet each one. If an additional mandatory requirement applies, it will be identified in section 5 of the SRFP.

Proposals that do not meet **all** mandatory requirements will be excluded from further consideration. If a proponent is uncertain about a mandatory requirement, do not make assumptions; instead, ask the Government Contact identified on the SRFP to clarify any uncertainty as to how to meet all mandatory requirements.

## 2.9. SRFP Section 6: Proposal Evaluations

### 2.9.1. Weighted Criteria and Minimum Scores

All proposals that meet mandatory requirements will be evaluated against the weighted criteria described in the table provided in section 6 of the SRFP, which identifies the points allocated to each section. This will help to assist proponents to understand the relative importance of one section to another. Any minimum scores that may apply will be identified in this table. A proposal that does not meet a minimum score will not receive further consideration.

### 2.9.2. Price / Budget Evaluations

Price is evaluated using the methodology described in the SRFP and this usually involves comparing each price against the lowest price offered. Because of this comparison, it is critically important for proponents to fully understand each element of pricing that is being asked for in the SRFP, which is defined in the SRFP Proposal Form.

For some SRFPs, budgets will be evaluated rather than price. The table will identify this, and the SRFP Proposal Form will provide further details.

Some SRFPs will not evaluate price or budget.

### 2.9.3. Determining the Successful Proponent

The successful proponent in an SRFP will be the proponent whose proposal meets all mandatory requirements and minimum scores (if applicable), and that scores highest overall. Although most SRFPs will evaluate price, it is not the sole determining factor in determining which proposal is successful.

## 3. HOW TO COMPLETE THE APPENDIX A - SRFP PROPOSAL FORM

Appendix A, the SRFP Proposal Form, has been designed as a smart form to simplify the process of creating a proposal. It includes information to help proponents understand what should be included in their proposal and space for proponents to write their answers. It helps proponents to maximize their score by facilitating a better understanding what is being sought while assisting proponents to include complete and relevant information in their proposals. Proponents must use the SRFP Proposal Form for their proposals (see section 2.7 of this guide).

To ensure the full usability of the SRFP Proposal Form, use version 8.1 or newer of Adobe Reader. Applications other than Adobe Reader or Adobe Acrobat may cause issues. A download of the latest version of Adobe Reader is available at <https://get.adobe.com/reader/>.

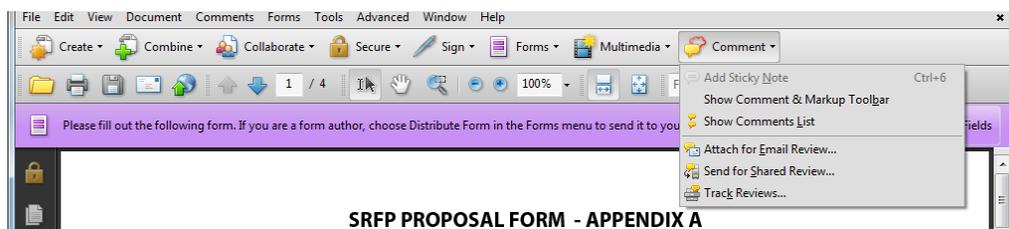
While the SRFP itself is restricted to two pages, proposals can exceed two pages, but proponents need to be mindful of complying with any proposal page limit assigned in the requirements paragraph at the beginning of the SRFP proposal form (Appendix A).

Proponents should not include attachments and/or URLs to their proposal unless specifically requested in the SRFP. If attachments/URLs are not requested in the SRFP but are included in a proposal, they will not be evaluated.

When developing the SRFP proposal, proponents can only enter information in the tables (text boxes). Click on the “Highlight Existing Fields” button on the top right (in the green ribbon) to see all the text boxes. Click this button again to remove these highlights. Note that none of these fields are mandatory; the SRFP Proposal Form can be saved at any time, using the Save icon on the top ribbon or clicking on “File” and “Save As” or “Save”.

Proponents can type directly into the smart form, or can copy and paste from other documents. Limited formatting options are available by right-clicking in the text box; additional formatting will require copying-and-pasting.

If the proposal will be reviewed by several people, the smart form allows for markups only if Adobe Pro is available (this is not the same as Adobe Reader, and will require a paid license). To use this feature, the author fills in part or all of the SRFP Proposal Form, as required, and then uses Adobe Acrobat Pro to print out the SRFP Proposal Form as a PDF. This PDF can then be opened by all users with the Adobe Acrobat Reader DC and markups can be applied as required. To markup the SRFP, click on the Comments button on the top ribbon, and then on “Track Reviews”. This will open a new screen with instructions on how to track these changes.



If Adobe Pro is not available, this markup feature is not available. In this case, sections of the SRFP Proposal Form could be created in Word, edited as needed, and the final version copied and pasted into the appropriate section of Appendix A, the SRFP Proposal Form.

The remainder of this section will step through the SRFP Proposal Form, and provide an overview of each.

### 3.1. Appendix A - Requirements

Section 2.7 of this guide explains the mandatory requirement to use the Appendix A SRFP Proposal Form. Do not use any other format for the development of proposals. Some SRFPs will also include a maximum number of pages. If such a restriction is stated, be sure to ensure that the proposal (i.e. the completed Appendix A) does not exceed this page count. If no such maximum is identified, no page limit will be imposed on the SRFP proposals. Note that only the SRFP document is restricted to two pages, not the SRFP Proposal Form.

### 3.2. Appendix A - Section 1: Mandatory Requirements

Some (but not all) SRFPs will have a mandatory requirement in addition to those that are found in the [SRFP Rules](#) referenced in the SRFP. The SRFP and the SRFP Proposal Form will describe any additional mandatory requirement(s) and indicate the information to be provided by proponents. The additional mandatory requirement(s) will either include specific instructions, or will indicate in which section of the SRFP Proposal Form it is addressed.

If no additional mandatory requirement(s) apply, this section will reference only the mandatory requirements in the SRFP Rules. Be sure to clearly demonstrate how all mandatory requirements are met (including any additional mandatory requirement(s), if applicable) to ensure that your proposal is included in the evaluation process.

### 3.3. Appendix A - Section 2: Proposed Subcontractors

The SRFP will state whether or not you will be able to involve subcontractors in your proposal. If subcontractors are allowed and a proponent intends to use subcontractors to support its delivery of the services, these organizations and/or individuals should be named in the proposal. If no subcontractors are to be used, write

“None” in the applicable box. If subcontractors will be used but they are not yet identified, indicate this in the space provided.

Contractors are responsible for all deliverables, including any that are delegated to subcontractors.

### **3.4. Appendix A - Section 3: Executive Summary**

Proponents are welcome to include an executive summary in their proposals. The summary should be succinct, and should not exceed 500 words.

### **3.5. Appendix A - Section 4: Experience / Other Criteria**

Most SRFPs will request information on the proponent’s experience, either for the proponent organization, for a single key person, or a team proposed to deliver the services. Proponents need to understand what is being sought, and what information should be provided to demonstrate their relevant experience. As the evaluation of proposals will be based on the specific elements listed, proposals should also be specific to them. If any elements are missed, the proposal likely will score lower as the full breadth and depth of experience will not be demonstrated. Only the information contained in the proposal will be evaluated; relevant past experience with the Province or the issuing ministry must be described in order to be considered.

The information asked for in this section is the minimal experience proponents should have; a proponent with more experience should provide more than the minimum expected, as this likely will result in a higher score for this section. If tables are offered for describing a proponent’s experience, use the “Add” button to insert additional tables, if needed, noting that some SRFPs will have a maximum number of tables that can be included.

If the proposal includes named proposed subcontractors, their experience can be cited for this section unless the specific SRFP says otherwise. However, only the experience of named subcontractors is valid; do not address the experience of unnamed subcontractors, or subcontractors that might be brought into the project should you be awarded the contract. If one or more subcontractors’ experience is cited in this section, be sure to have named the subcontractor(s) in Section 2 of the SRFP Proposal Form (Appendix A) in order to avoid the possibility of a lower score.

For some SRFPs, particularly those that are directed to specific vendors such as qualified suppliers who have been pre-qualified in a Request for Qualifications (RFQ) process, experience may not be evaluated. Instead, section 4 of the SRFP Proposal Form will address a different aspect of service delivery or capabilities. It will define what is being sought, and include specific instructions on what information to provide in proposals.

### **3.6. Appendix A - Section 5: Approach / How Services Will Be Delivered**

Most SRFPs will ask proponents to describe how they intend to deliver services (i.e. the approach to service delivery). Proponents are strongly advised to address all elements identified in section 5 in detail.

Proponents are encouraged to explain why their proposed approach will create efficiencies, increase quality or otherwise benefit the Province. Such “value add” elements of service delivery will likely result in higher scores in this section if accompanied with a compelling rationale as to why the proposed value-add is feasible.

The deliverables in the final contract will be based on the successful proponents’ description of how they will deliver services and the information provided in Section 1 Contract Services of the SRFP (including any referenced websites and/or appendices, if applicable). Proponents are bound to what they propose and will not have the option of changing their proposed approach or re-defining the scope of work (as described in the SRFP) if they are offered the contract. Although additional details may need to be articulated in the contract, none of those details can change what was stated in the successful proposal or SRFP.

### **3.7. Appendix A - Section 6: Optional Category**

Some SRFPs may include an optional category to further define proposals. If this optional category is included, the SRFP Proposal Form will describe what is being sought and what information proponents are to provide. Again, be sure to address all elements included, if this section applies.

### **3.8. Appendix A - Section 6 or 7: Price / Budget**

The SRFP describes what proposed pricing is to include, and the SRFP Proposal Form includes a table for inserting the price(s) described. When proposing a price, be sure to be inclusive of all costs as described in the SRFP; proponents will not have the option to increase their pricing during contract finalization. As price is generally compared between proposals (as described in the specific SRFP), be sure to ask the Government Contact questions if any aspect of what to include in price is not clear. Do not assume that anything can be billed separately from the price(s) proposed, unless the SRFP specifically states otherwise.

Some SRFPs will address Budget rather than Price. In this case, the SRFP Proposal Form (Appendix A) will explain what should be included in the budget, and how it will be evaluated. Instructions will also be provided on how the budget is to be provided. Proponents may insert their response in the text box provided, or, if these instructions direct proponents to attach an appendix to their proposal, indicate “see attached” in the text box and include the appendix with the proposal.

If the Price / Budget is requested in the SRFP Proposal Form, it will be numbered section 7 if the optional category (see section 3.7 of this guide) is included, or section 6 if it is not.

Some SRFPs will not evaluate either price or budget. This will be clear in the SRFP document itself.

### **3.9. Appendix A - Section 6, 7 or 8: Confirmation of Proponent’s Intent To Be Bound**

The final section of the SRFP Proposal Form identifies who the proponent is, and confirms that the proponent agrees to be bound to what they have stated in their proposal. Both of these elements are essential to the SRFP process, meaning that the Province cannot accept a proposal where the name of the proponent is unclear, and/or where no signature exists. For clarity, proponents should provide their legal name when completing this section of the SRFP Proposal Form.

If the SRFP allows eBids, the proponent’s eBidding key is considered equivalent to a signature to this section.

This section includes the optional Business Number (federal GST/HST number) field. If the proponent has a Business Number, it should be recorded here for the convenience of creating the final contract, in the event the proposal is successful. However, leaving this line blank will not affect the evaluation of proposals.

By submitting a proposal, proponents are agreeing to be bound by all the terms and conditions set out in the SRFP Rules found at this [website](#). Proponents should be fully aware of what they are agreeing to by reading the SRFP Rules (the terms and conditions applicable to the SRFP) and consulting their legal advisor for any questions regarding these provisions.

The Confirmation of Proponent’s Intent to be Bound will be numbered section 8 if both the optional category (see section 3.7 of this guide) and a Price / Budget category (see section 3.8 of this guide) are included. If only one of these categories are included, the Confirmation will be numbered as section 7. If neither the optional category or Price/Budget are included, Confirmation will be numbered as section 6 of Appendix A.

## 4. SUBMITTING A SRFP PROPOSAL

Each SRFP will explain how to submit proposals. Depending on the proposal delivery method(s) specified in the SRFP, this may be in hard copy to the identified address, or it may be electronically via the [BC Bid website](#), or it may be via email. If more than one option is available, proponents should choose the delivery method that best suits them but should not send multiple versions of the proposal (i.e. one in hard copy and the other through BC Bid).

Proponents are solely responsible for ensuring that their proposal arrives on time, in compliance with the instructions in the SRFP.

### 4.1. Hard Copy Submissions

For those SRFPs that allow hard copy submissions, the proposals must be hand-delivered or couriered to the physical address identified on the SRFP. Include at least one signed hard copy of the proposal (i.e. where the Proponent's Intent to be Bound section is signed, as described in section 3.9 of this Guide), and an electronic copy on CD, DVD or USB media. Do not send proposals via mail or fax, as this would result in rejection of the proposal.

### 4.2. Electronic Submissions

Some SRFPs will allow eBid and/or emailed submissions.

If submitting a proposal through the BC Bid eBidding process, proponents must have registered for eBidding. Proponents are required to use their own eBidding key; using a sub-contractor's eBidding key is not acceptable. Details on how to register can be found at [www.bcbid.ca](http://www.bcbid.ca). Although the process to register is usually uncomplicated, proponents are advised to register in advance of the closing date and time of the SRFP to ensure sufficient time to manage any issues or problems that may occur.

When a proposal is submitted through BC Bid's eBidding process, the eBidding key is equivalent to a signature on the proposal. The Proponent's Intent to be Bound section of the SRFP Proposal Form should be completed, but no signature is required. The eBid itself is the signature that binds the proponent to their proposal.

If emailed submissions are permitted, refer to the [Guidelines for Vendors for Submissions via Email](#) before deciding on this delivery mechanism to fully understand the risks of sending proposals via email. Be sure to completely fill out the Proponent's Intent to be Bound section, including a signature in the appropriate box (print the Appendix A, sign and scan it as **the template does not use the electronic signing functionality** built into Adobe). Send the proposal to the email address indicated on the SRFP, which may be different from the Government Contact's email address. Proponents may wish to confirm with the Government Contact that the email was received well before the Closing Time, to ensure adequate time to address any issues if the email was not received.

## 5. FREQUENTLY ASKED QUESTIONS

### 5.1. Why isn't the SRFP process used for all RFP competitions?

Although the SRFP has many advantages, including reducing the time required of both proponents and government staff, it's not suitable for all competitive procurement processes. Many contracting opportunities cannot be adequately described within the page limit of the SRFP, meaning that proponents could not submit a comprehensive proposal as the full scope and complexities of the contract could not be disclosed.

Also, the Province needs sufficient information to differentiate proposals in the evaluation process. For some contracts, this requires extensive information that cannot be obtained within the limitations of the SRFP process.

## 5.2. Do I have to use the SRFP Proposal Form?

Yes. Use of the SRFP Proposal Form is a mandatory requirement of the SRFP process. Proponents are required to complete the smart form identified as Appendix A SRFP Proposal Form, otherwise their proposal will be rejected.

## 5.3. I have a question regarding a SRFP. Who can I contact for more information?

For questions specific to a particular SRFP, send an email or fax to the named Government Contact. Be specific as to what is confusing or unclear, in order to obtain the specific information needed. Be sure to identify the SRFP name and number in the correspondence. Answers to questions may be posted as addenda on BC Bid with the specific SRFP, or may be directly sent to all proponents for those SRFPs that are not posted on BC Bid.

If the questions are applicable to SRFPs generally, email the question(s) to [procurement.transformation@gov.bc.ca](mailto:procurement.transformation@gov.bc.ca).

## 5.4. I have questions about a SRFP. Why can't I ask the ministry staff that I know?

To maintain the integrity and fairness of the process, all proponents must have the same information available to them at the same time. Consulting with ministry staff (other than the Government Contact) may result in information sharing that is not available to all proponents, which creates unfairness in the process. In addition, these other staff may not be fully aware of all important aspects of the SRFP and any information that they provide may not be accurate resulting in negative consequences for the proponent.

## 5.5. Do I need to meet all mandatory requirements?

Yes, because the Province will only consider proposals that meet all the mandatory requirements set out in the SRFP. If you do not meet one or more mandatory requirements, your proposal will not be further evaluated.

## 5.6. Can I negotiate changes to the Contract Format clauses if I'm successful?

No. By submitting a proposal, proponents are agreeing to all the applicable terms and conditions of the SRFP including the form of contract presented in the SRFP (see section 2.5: Contract Format of this guide).

## 5.7. Why can't I send in my proposal via fax?

Based on feedback received during the SRFP vendor consultations, fax is not a commonly used tool anymore as almost all vendors have access to the internet. In addition, faxed submissions may result in additional risk of proposals arriving late (e.g. the fax machine is busy, or some of the faxed submission arrives on time while other parts are late). For these reasons, faxed submissions are not offered as an option.

### **DISCLAIMER:**

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