



MINISTRY WRITERS' GUIDE: DEVELOPING & MANAGING SHORT-FORM REQUESTS FOR PROPOSALS (SRFP)

Shared Services BC
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1. INTRODUCTION

Vendors have expressed concerns regarding the complexity of the Request for Proposals (RFP) process. In response, the Province of British Columbia has developed a two page Short-form Request for Proposals (SRFP) for most contracts under \$250,000. Government direction is for ministries to use the SRFP for all competitive procurements that fall within scope.

1.1. Purpose of this Guide

This Guide will assist ministries to determine when to use the SRFP, to develop the SRFP documents, and to manage and document the competition. By following the information and suggestions it contains, ministry staff can manage clear and concise procurements that should result in demonstrated best-value contracts.

Key Point: Resources for ministry buyers using the SRFP are available online at:
<http://www.gov.bc.ca/srfp>

This Guide is intended to be used in conjunction with the SRFP and SRFP Proposal Form smart form templates. It includes numerous optional approaches as well as suggested language that can be copied and pasted into specific SRFPs, as appropriate. The SRFP smart form templates are available [online](#).

1.2. SRFP Rules

All competitive processes include rules (also known as the terms and conditions) that identify how the competition will work. The SRFP Rules can be found through a website link on the SRFP and the SRFP Proposal Form. When submitting a proposal to an SRFP, proponents agree to all of the SRFP Rules.

Ministries should visit the [SRFP Rules link](#) to fully understand the terms and conditions that apply to the SRFP process. SRFP Rules are binding on both the proponents who submit proposals to the SRFP as well as the Province.

If any of the SRFP Rules are unclear or if a situation arises where their application is difficult to determine, contact the Legal Services Branch (<http://gwww.legalservices.gov.bc.ca/index.aspx>) or the Procurement Services Branch (<http://www2.gov.bc.ca/gov/topic.page?id=FEDA187B73374DE792C8FE50C09F769D>).

1.3. Components of the SRFP

All SRFPs will include at least two documents in addition to the SRFP Rules: the SRFP itself, and the corresponding SRFP Proposal Form. The SRFP describes what is being purchased, and the SRFP Proposal Form identifies the ministry's expectations and the information that proponents are to provide in their proposals.

Vendors must use the SRFP Proposal Form to create their proposals, as it is a mandatory requirement and has been designed to ensure that complete and pertinent information is provided.

1.4. Issuing the SRFP

SRFPs can be posted on BC Bid as a "Short-form Request for Proposals" or, in certain circumstances, they can be directed to selected proponents only.

If posting on BC Bid, be sure to select the "Short-form Request for Proposals" option, as this will ensure that BC Bid draws proponents' attention to the terms and conditions that apply (see section 8 for more information).

SRFPs should always be posted to BC Bid, unless one of the following conditions applies:

- The service contract will cost less than \$75,000 in total (this limit is \$5,000 for goods), in which case at least three known vendors can be selected and the opportunity restricted to just these invited vendors; or

- The opportunity is being restricted to a List of Qualified Suppliers, which was created specifically for the services required, through a Request for Qualifications (RFQ) posted on BC Bid. See section 6 for more information on using the SRFP with Lists of Qualified Suppliers.

If not posting the SRFP on BC Bid, be sure to send the SRFP Rules to the invited proponents with the SRFP package. The link alone will not be sufficient; the SRFP Rules should be sent as either a separate file electronically, or as part of the package faxed to the selected proponents. A pdf version of the SRFP Rules can be found [online](#) for this purpose.

2. SCOPE

Government's expectation is that ministries will use the SRFP process for all contracts that fit within the SRFP scope and exposure profile. The following information is intended to assist ministries in determining when the SRFP is the right procurement tool for their contracts. Policy allows ministries to use a different procurement methodology for an in-scope contract, but the use of the SRFP will be monitored and therefore the rationale for such decisions should be well documented.

General guidance has been created for ministry staff to select an appropriate solicitation process; the SRFP is one option for ministries among many. This general guidance can be found [online](#).

Key Point: Ministries are responsible for selecting the solicitation process that best meets their needs. The SRFP is one of several tools available to acquire goods and services.

2.1. Criteria for Using the SRFP

Contracts that meet the following criteria are considered in scope:

1. The contract value is expected to be under \$250,000 (if uncertain whether the overall contract value is under \$250k (e.g. options to renew are included), contact your ministry's financial department for clarity).
2. No Corporate Supply Arrangement exists that would meet the ministry's need. See the Core Policy and Procedures Manual [section 6.3.2 a 1](#), and visit the [CSA webpage](#) for more information.
3. A rationale for direct award, as allowed in policy, does not apply (noting that a Ministry can choose to issue the SRFP even if a direct award is possible in policy, but is not obligated to do so). See the Core Policy and Procedures Manual, [section 6.3.3. a 1](#) for more information.
4. The opportunity will result in a Ministry contract where the contract format is known. The contract format can be one of the [General Service Agreements](#) or another contract format that has been approved by the Legal Services Branch. **If the full contract has elements that will be negotiated, the SRFP is not the appropriate format to use.** For example, if the contract will include a software licensing agreement that is to be negotiated with the successful proponent, the SRFP is NOT the appropriate process to use.
5. More than price is evaluated. The intent is to award the contract to the highest scoring proponent, which may or may not be the lowest price. If price is the only differentiating factor (i.e. the award will be made to the lowest price that meets specifications), the Invitation to Quote (ITQ) for Services should be the procurement process used.
6. Although the SRFP can be used to acquire goods, consider what additional value is being sought that would warrant spending more than the lowest price proposed. The SRFP is expected to be used primarily for services, although it will work for goods acquisitions where more than price is to be evaluated.
7. The contract is considered to have lower exposure, as determined using the exposure matrix below.

2.2. Exposure Matrix

The table below defines what is considered lower and higher exposure for the purposes of the SRFP only. Exposure definitions will vary for other purposes; this matrix should not be used for determining procurement exposures specific to other solicitation processes.

If the contract meets all other elements defined as in-scope as per section 2.1 above, use the following matrix to determine whether or not it also would be considered a lower exposure. Most contracts will have some elements of lower and some of higher exposure, as defined in the table. It is at the ministries' discretion to choose the procurement tool that best meets their operational needs. If uncertain, this table provides criteria that ministries can assess to assist in determining whether or not the SRFP will meet their needs. If multiple higher exposure criteria, as identified below, apply to the contract, the SRFP may not be the appropriate tool to use; if only one or two higher exposure elements apply to this contract, the SRFP may still meet the ministries' needs.

	Lower Exposure Contracts	Higher Exposure Contracts
a)	The Province has contracted for substantively the same services in the past.	This is a new service, or substantive changes were made to how services have been delivered.
b)	The scope is well known and can be defined.	The scope is vague, as a number of solutions could address the need/problem, or future undefined phase(s) apply.
c)	Industry or provincial standards and/or performance measures exist and can be referenced.	No standards or performance measures currently exist.
d)	The Province's requirements can be described within the two-page limit of the SRFP (noting that URLs and/or appendices are acceptable).	The requirements are complex, and are difficult to adequately describe in the two-page limit.
e)	Face to face contact is not needed. Answers to Proponent questions can be managed through written addenda, and no Proponents' Meeting or shortlist process (e.g. interviews, presentations, user testing, etc.) are required.	A Proponents' Meeting is required OR a shortlist process (e.g. interviews, presentations, user testing, etc.) is essential to differentiate proposals.
f)	Proponent experience can be evaluated by addressing only ONE of the following: organizational experience; one individual's experience; or the experience of a collective team of key personnel.	To ensure a fully qualified contractor, evaluation of the organization's and one or more individuals' experience is required.
g)	What is to be included in price and how price will be evaluated can be clearly described.	Price is complex, requiring considerable definitions for what should be included, and/or how price will be evaluated is complex.

Contact the [Procurement Services Branch](#) for assistance in using this exposure matrix, if needed.

2.3. Documenting the Scope Analysis

If the contract value is under \$250,000 and the ministry decides not to use the SRFP, the procurement file should include documentation on how the contract does not meet the criteria to be considered in scope for the SRFP process. To be considered in scope, the contract:

- Meets all criteria identified as items 1 through 6 above; and
- Is considered “Lower Exposure” by meeting the majority of the criteria identified as “Lower Exposure” in the table above.

Ministries may use Appendix 2 Scope Analysis for the purposes of documentation.

If the contract fits within the scope but the ministry decides not to use the SRFP, the file should contain the rationale for this decision.

3. WRITING THE SHORT-FORM REQUEST FOR PROPOSALS (SRFP)

The SRFP contains information that is crucial to the process and should be written to facilitate vendors’ understanding of what is being purchased. The SRFP is a smart form template, meaning that some portions of the document cannot be changed, and other portions are to be completed by the SRFP writer. Once the SRFP is finalized, it becomes a conventional pdf document.

When completing the SRFP and the SRFP Proposal Form (see section 4 below), be sure to read the definitions in the SRFP Rules. When using these words in their defined meaning, capitalize the defined words and terms. However, the words “must”, “mandatory”, “should” and “desirable” are always used as they are defined; select different words if the defined meaning is not intended.

Following is guidance on how to complete all sections of the SRFP template; use this section of the Guide in conjunction with the SRFP smart form template.

3.1. Overview for Using the Smart Form

The SRFP smart form template includes instructions on the information that the SRFP writer is to insert into the document, as well as options. Radio buttons indicate that one of the options must be chosen, whereas check boxes are optional fields that allow the SRFP to include or delete that option. In addition, text boxes are included that are to be completed with specific information; right clicking in the smart form while in a text box gives options that may assist with formatting, spelling, hyperlinks, etc.

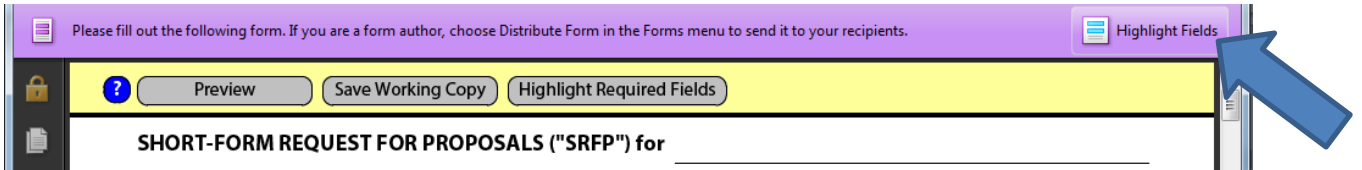
This SRFP template is restricted to TWO PAGES ONLY; the smart form will not allow ministries to create an SRFP that is longer than two pages. Within this page limit, the SRFP must provide sufficient information for proponents to understand the scope of the services being purchased and the contractual obligations that will apply in the resulting contract.

However, when creating the SRFP using the smart form, it will initially appear that the document exceeds two pages. The smart form has been designed to link the SRFP to the SRFP Proposal Form; once the SRFP is saved in its final format, these documents will split into the two-page SRFP and a separate SRFP Proposal Form (i.e. Appendix A).

The smart form has three buttons at the top of each page – “Preview”, “Save Working Copy”, and “Highlight Required Fields”. The “Preview” button will show what the final version of the SRFP and the SRFP Proposal Form will look like in its current state. The “Save Working Copy” button enables the draft smart form to be saved (still

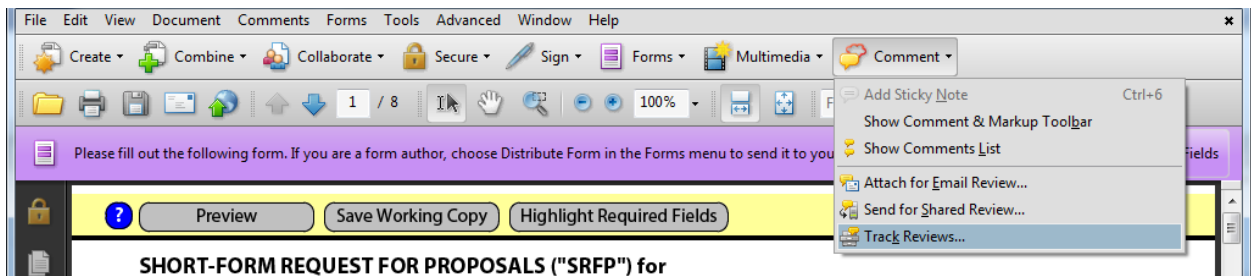
as a single document) under the name and location of the SRFP writer's choice (clicking on ctrl S will also save the working copy). As with any electronic file, updates can either override the same file name or can be named differently for version control. The "Highlight Required Fields" button will highlight all fields in red that still need to be completed for the final version of the SRFP.

In addition to the three buttons at the top of each page, Adobe also has the ability to highlight all fields. For the SRFP smart form, these highlights will all be green. To turn on these highlights go to the purple ribbon at the very top of the smart form and click on "Highlight Fields" (see diagram below). If the smart form opens with this feature already selected, click on the "Highlight Fields" icon and all green highlights will disappear.



Note that the final version of the SRFP can only be saved in the Preview mode. See section 5 for step-by-step instructions on how to save final versions of the SRFP and Appendix A SRFP Proposal Form.

If the SRFP will be reviewed by multiple people, the smart form does allow for tracked changes. 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.



3.2. Headers (Title, Number & Issuing Entity)

Every SRFP will need a name that is descriptive of the purchase, which should be inserted in the first field of the smart form. If location is important (e.g. the services need to be delivered within a certain region or community), the title should include this location. The title should make it easier for vendors to determine whether or not this opportunity is of interest. This title will automatically be inserted into the header of the SRFP Proposal Form (see section 4.1 below for more information).

In the next line, identify the ministry or organization name (e.g. Public Service Agency) that is issuing the SRFP. This should be the same ministry identified in BC Bid (if posting to BC Bid). Again, this information will automatically be inserted into the SRFP Proposal Form.

For ease of reference, all SRFPs will require a unique number, which should be inserted in the field just after the issue date (see section 3.3 below). As with the conventional RFP process, the format of this number is at the discretion of the issuing ministry. This number and the month and year of the SRFP issue date will automatically appear in the footer on all pages of the SRFP and the SRFP Proposal Form.

3.3. Issue Date

The issue date is important to the SRFP process, and this field defaults to the current date, which can be overridden. (See section 3.4 below, for information on the Closing Date and Time). The SRFP Rules may change over time, including during the period that an SRFP is posted. In this case, the SRFP Rules that were in force the

date that the SRFP was issued is the version that applies. If changing the date, click on the field and use the calendar feature to select the desired date. Dates can be inserted manually, but will default to the month name, day and year; if manually inserting a date, ensure that it is accurate when it converts.

Note that the issue date defaults to today's date each time the working copy of the SRFP is opened. Prior to saving the final version of the SRFP (see section 5 below), ensure that the date accurately reflects the intended issue date, making any changes as necessary.

3.4. Closing Date and Time

The SRFP includes the mandatory requirement for proposals to arrive BEFORE the Closing Date and Time. The smart form defaults the closing time to 2:00 p.m., which is hard-wired into the process and cannot be changed; however, the closing date is at the discretion of the ministry. The smart form will default to the date that is four weeks after the issue date, but this can be overridden (again, click on the field and use the calendar to pick a date).

Note that the closing date defaults to four weeks after today's date each time the working copy of the SRFP is opened. Prior to saving the final version of the SRFP (see section 5 below), ensure that the closing date accurately reflects the intended date, making any changes as necessary.

Any proposal that is received at or after the Closing Date and Time must be rejected. This means that if a proposal that arrives at 14:00 on the closing date, it is late as it did not arrive *before* the Closing Date and Time.

Ministries should be realistic and as generous as possible when determining the closing date. Based on the feedback received during the vendor consultations, the time period for proponents to respond to an SRFP (the "Posting Period") should be no less than four weeks. Shorter Posting Periods can sometimes be considered, provided that the:

1. Information requested in proposals is minimal;
2. Posting Period does not incorporate any statutory holidays;
3. Posting Period is not between Canada Day and Labour Day, or the two weeks surrounding Christmas day and New Year's day; and
4. **Posting Period is not less than three weeks.**

If posting the SRFP on BC Bid, be sure that the Closing Date and Time selected matches the one in the SRFP, noting that closing time is set at 14:00 to correspond to the SRFP itself.

3.5. Closing Location

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). Using the check boxes, include at least one of the options available, although ideally, SRFPs should allow both of these options. If allowing hard copy submissions, insert the number of copies needed (using numerals only) and the physical address where proposals will be received (including postal code and suite/floor number, if applicable); do not use post office box addresses.

If more than one option is available, the SRFP Proponents' Guide includes instructions for proponents to select only one of the available delivery options.

When determining how to receive proposals, consider the following for each of the options available.

- For hard copy submissions:
 - The cost to proponents for photocopying, collating and delivering the proposals (noting that the SRFP should ask for only one hard copy – although more is permitted - plus an electronic copy on CD or USB media);

- The need for the ministry to make any additional hard copies that may be required (although the electronic copy can be emailed to all evaluators);
- The time required to deliver hard copy proposals for those proponents located further from the closing location; and
- The ministry's ability to date-and-time stamp proposals as they arrive, and to securely store the proposals until after closing.
- For eBidding:
 - Only SRFPs that are posted to BC Bid can use this option;
 - The proponents' ability to register for an eBidding key prior to the Closing Date and Time (noting that registration will not be instantaneous, particularly if many registrations arrive within a short time of each other);
 - The reliability of internet connections for those proponents in remote locations, if applicable;
 - The ministry staff's knowledge of BC Bid to allow for eBidding when posting the opportunity and to download the proposals (noting that help is available through the BC Bid Help Desk); and
 - The cost of eBid registration (i.e. \$150 per year).

The SRFP template specifically excludes faxed submissions for the following reasons:

- Many proponents submit their proposals in the last hour or two before the Closing Date and Time. The fax machine may become very busy which could result in a proposal arriving late due to a busy signal.
- The accuracy of the date-and-time stamp on the fax machine is problematic.
- A faxed submission may arrive with some pages that arrive on time and some that are late. The ministry will then have to decide what, if anything, can be accepted.

The SRFP template specifically excludes emailed responses because of the legal and technical issues that may occur if the email delivery is delayed past the Closing Date and Time. However, this is currently under review, and may change in the future. In the meantime, ministries cannot change the language that excludes emailed submissions, and should not accept emailed proposals as no legal language exists to protect the Province if the proposal is received late due to an issue with the Province's system.

The SRFP template specifically excludes mailed responses because all Canada Post mail addressed to the Province is first sent to a central government location, regardless of the address indicated on the envelope. This process generally delays mail by one or two days, which may be enough to cause a proposal to be late.

Only proposals received in accordance with the SRFP instructions at the identified closing location before the Closing Date and Time can be accepted. Therefore, the ministry will need to keep evidence of when all proposals were received, regardless of which methodologies are chosen for delivery. For hard copy submissions, ministries will require a reliable process to date-and-time stamp all proposals. BC Bid has date-and-time stamp functionality, and will record the receipt time of all proposals received via eBidding automatically. BC Bid will also send an email confirmation receipt to the proponent indicating that the proposal was received.

3.6. Government Contact

Every SRFP requires the name and contact information (i.e. email address and fax number) of the Government Contact. Insert this information in the Government Contact field.

This individual does not need to be a decision-maker or evaluator, but is responsible to receive all proponent questions, to disseminate those questions to the individuals who will draft answers, and to ensure that all proponents have access to these questions and answers at the same time. The contact information provided

should be accessible to more than just the named Government Contact, to address any planned or unplanned absences (e.g. a central email inbox rather than a personal inbox).

Do not include a phone number for the Government Contact. The Province should not discuss the SRFP with just one proponent, as this would undermine the integrity of the process. Answering proponents' questions over the phone can result in the following:

- The proponent phoning is getting information that was not available to other proponents at the same time. Even if an amendment is immediately posted after the phone call that includes everything discussed, one of the proponents received this information before anyone else could.
- The information provided over the phone may not be exactly the same as the addendum that is posted later. It can be very difficult to exactly remember and record a telephone conversation.
- The Province will have no ability to strictly prove what was said during the telephone conversation, in the event that any allegations are made of unfair treatment.

3.7. Terms and Conditions

Unlike conventional Requests for Proposals, the terms and conditions are not set out within the body of the SRFP. Instead, the SRFP Rules are incorporated by reference, and a link provided to access the text of the SRFP Rules (see section 1.2 for more information).

The Province must do what it can to ensure that Proponents understand the importance of the SRFP Rules when submitting a proposal. The SRFP draws this to their attention, by informing readers that the SRFP Rules apply and providing a link. This ensures that in the event of a dispute where a proponent argues that they did not know about the SRFP Rules, the Province can state that they should have known given everything that was done to bring the SRFP Rules to their attention.

The paragraph that informs proponents about the SRFP Rules is hard-wired into the SRFP smart form template and cannot be changed. The SRFP Rules can be found [online](#).

3.8. Section 1: Contract Services

This section describes the scope of the services that are being purchased through the SRFP process. In order to keep the SRFP within the two-page limit, Section 1 Contract Services should be less than one page; consider using point form and concise language to meet this space limitation.

If this section is too large to fit within the two-page limit, in the Preview, a warning will show up in the heading that says "Warning: The amount of Contract Services text exceeds the maximum limit." If this occurs, go back to the Working Copy view and edit the text to make it shorter. The smart form cannot be saved as a final version if the SRFP (exclusive of the SRFP Proposal Form) is longer than two pages

Key Point: Editing your requirements to two pages can be difficult, but is not impossible. Challenge your ideas about what information needs to be provided to vendors, and think through your requirements prior to completing the SRFP smart form template.

The scope of services should include a description of the services and/or goods being purchased, timelines expected, dependencies with other programs or services, stakeholders who will be involved, and any other elements that will assist proponents to understand what will be included in the contract. If a contractor is currently providing the services, this section should state the name of this contractor and whether or not they are an eligible proponent to the SRFP.

Ministries may reference website addresses (URLs) and/or appendices attached to the SRFP that contain information directly relevant to the services required in this section. Such references will enhance the proponents' understanding of what is expected in the contract. Examples of useful information that may be contained in these references include, but are not limited to, program overviews, historical volumes purchased, forms that the contractor will have to complete, service standards and/or measures that are to be met, etc. However, these URLs and appendices should not be too large; use judgement when including URLs and/or appendices to ensure that the spirit of a streamlined and focussed procurement process isn't lost. If referencing a URL and pertinent information is embedded with other information that is not critical, direct proponents to specific sections of the website where the key information can be found. Be sure to check all links to ensure that they are active and accurate.

If formatting such as numbered lists or bullets is desired for this section, manually insert them into the smart form. Alternately, Word can be used with all the appropriate formatting (including tabs, indents, etc.), which can then be copied and pasted into the smart form. However, be aware that bullets may be interpreted as the web ding font in the smart form, meaning that the first line in a bulleted list may not be legible. If this occurs, copy the single line again from the Word document and re-paste (the smart form is not a word processor and therefore does not have an option to change the font).

3.9. Section 2: Contract Format

All SRFPs will use a contract format that has been approved by the Province's Legal Services Branch. This may be one of the General Service Agreements (GSA), or it may be a customized contract specific to a ministry or a service. When submitting a signed proposal in response to an SRFP, proponents are agreeing to a contract substantially the same as the format identified in this SRFP section, if they are successful. Proponents and the Province do not have the option of changing the contract clauses after the SRFP closes.

The SRFP template includes both options for the contract format – the GSA and a customized contract. Using the radio buttons, select the appropriate option; the other option will be deleted automatically in the preview mode and the final version.

3.9.1. Option 1: General Service Agreement (GSA)

If the final contract will be one of the GSAs, use the radio button to choose the first option for contract format, and one of the next three radio buttons indicating which one of the three GSAs apply; refer to http://www.pss.gov.bc.ca/psb/gsa/gsa_index.html for guidance on which is best for the specific contract.

The GSA can be used for service contracts that will not exceed \$250,000, including all options to renew. In other words, a contract valued at \$60,000 per year with a potential of a five-year term when all options are considered, has an overall value of \$300,000. If the GSA appears to be the appropriate contract format but the overall value of the contract exceeds \$250,000, obtain approval from the Legal Services Branch for its use.

All the GSA templates include basic Commercial General Liability insurance. Any additional insurance types required must be identified, if applicable; refer to the [Insurance Overview: Types, Amounts and Approved Wording](#) for information to assist in this decision. Using the radio buttons, select either "additional insurances do not apply" or "additional insurance is required" and specify what they are. The SRFP smart form template does not give the option to remove all insurances; if the Risk Management Branch advises that no insurance is required for a specific contract, this can be managed as an addendum to the SRFP. You can contact Risk Management Branch [online](#).

Schedule E is the Privacy Protection Schedule. This schedule is required if the contractor will have access to any personal information, as defined in the [Freedom of Information and Protection of Privacy Act](#). Using the radio buttons, specify whether or not Schedule E applies. If Schedule E does apply, it is to be used without any modifications.

Schedule F is Additional Terms. Most GSAs will not include additional terms, although some contracts are of a specialized nature that may require additional contract language to protect the Province's interests. Using the radio buttons, select whether or not Schedule F applies. If additional terms are required, attach those that have been approved by the Legal Services Branch as Appendix B to the SRFP.

Schedule G is the Security Schedule. Refer to the [Schedule G Procedures](#) for guidance on whether or not it is needed for a specific contract. Using the radio buttons, indicate whether or not Schedule G applies. If Schedule G does apply, it is to be used without any modifications.

3.9.2. Option 2: Customized Contract

If the GSA is not suitable, select the radio button for the contract that is attached as Appendix B. Create Appendix B using the contract format that has been approved by the Legal Services Branch for this contract.

The customized contract attached as Appendix B must be a complete contract template, including all applicable schedules. However, it is understood that the description of services, fees and expenses, and approved sub-contractors will be completed once the SRFP process is completed and the successful proponent identified.

3.9.3. Contract Term

Regardless of which option is used for the contract format, the SRFP must identify the expected contract term, meaning how long the contract will exist, including any options to extend the term. Try to avoid specific dates, if possible, as these dates often slip due to unforeseen circumstances.

In the appropriate field, insert how long the initial term is expected to be; this is a mandatory field in the smart form. Use the radio buttons and fields to specify if this term will begin from contract signing (if the actual date is not firm) or from a specific date (which will need to be inserted in the appropriate field).

Ministries have the choice of a specific term with no options, or an initial term plus options to extend. If including an extension, click on the check box for this option in the SRFP smart form template and fill in the specific details. Usually, proponents will provide firm pricing for the initial term only; pricing for options to extend are generally subject to negotiations between the contractor and the Province.

Following are some examples of how to define the contract term, with hard-wired wording (i.e. wording that cannot be changed) italicized; adapt the actual numbers or dates to suit:

"The term of the Contract is expected to be for six months from Contract signing."

"The term of the Contract is expected to be for two years from Contract signing, with up to 2 one-year option(s) to extend at the sole discretion of the Ministry."

"The term of the Contract is expected to be for one year from April 1, 20xx to March 31, 20xx, with up to 4 one-year option(s) to extend at the sole discretion of the Ministry."

Some fields will only accept a numeral, not text. If options to renew are not applicable, do not click on the box for this option. However, options to extend a contract can be desirable for both the Province

and the contractor, as it gives continuity of service and avoids annual competitive processes. Consider the following when determining whether or not options should be included:

1. Are the services likely to be needed continuously over an extended period of time, or will they have a definitive end date when the project is complete? For example, social services usually are an ongoing need, where the services will be needed for as long as the funding is available. On the other hand, consulting services to provide research and advice that will inform a ministry decision would have a definite end, once the research and recommendations report is complete.
2. Do the services include costs outside the control of the contractor that will be difficult to predict past a year or two? Proponents are bound to their proposals, including the pricing proposed. If the nature of the services makes predicting these costs difficult, proponents will likely increase their contingency budget if asked to propose pricing for several years. If the expected cost increases do not occur, the contractor is unlikely to reduce their proposed prices for those future years. If the cost increases are higher than anticipated, the contractor will likely make a case to the Province to amend the contract for additional funding, or may cancel the contract in order to avoid losing money. In either case, the firm pricing proposed does not result in a favourable outcome to the Province. Instead, options to extend can give the opportunity for price changes, noting that the Province would only agree to such changes if the contractor's rationale was sound and the additional funding was available.
3. Is the scope of the services expected to change significantly in the foreseeable future? If so, consider what impact this will have on the fairness of the solicitation process, both in perception and reality. Options to extend can be used under these circumstances, if the potential scope changes are explained and the SRFP clearly states what can be negotiated as a change in the options (use the Contract Services section for this explanation, if needed). However, if the changes are not yet well defined or are extensive, the better decision may be to go back to the market once the scope has been redefined.
4. Policy does not limit the number of options to extend that may be included in a competitive procurement process and the resulting contract, but it does state that the number of options must be identified (see the [CPPM, section 6.3.3 \(e\) 10](#)). Therefore, if options to renew are selected in the SRFP, the smart form requires that the fields defining how many options exist and the length of each one be completed.
5. Exercising an option to extend at the "sole discretion of the Ministry" does not mean that the Province can use any excuse not to offer the extension. Acceptable reasons to decline the option to extend include:
 - a. The Province has decided not to continue with the services (e.g. the funding was cut to the program);
 - b. The Province will deliver the services in-house rather than through a contractor;
 - c. The scope of services is significantly changing; or
 - d. Contractor performance has been an issue, noting that this is only valid if the Contractor is aware of the performance issues, and was given the opportunity to rectify the problem but did not. Documentation that demonstrates all this to be true will be required. Ministries should consult with the Legal Services Branch under these circumstances.

If options to extend are included, they are not a guarantee that the Province and the contractor will come to agreement for those extensions. The Province's obligations are to offer the extension (subject to item #5 above) and to negotiate with the contractor in good faith. Usually, this will result in a signed amendment to the contract, but it is possible that agreement cannot be reached.

3.10. Section 3: Questions

This section explains how proponents can ask questions about an SRFP, noting that questions are to be sent in writing by e-mail or fax to the Government Contact. Answers to questions will be provided in writing, as addenda, to the SRFP. Refer to section 3.6 for more information on the Government Contact, including an explanation on why questions should never be answered directly to just one proponent.

If the SRFP is posted on BC Bid, select the radio button that states all addenda will be posted on BC Bid. If the SRFP is not posted on BC Bid but rather has been sent to a select number of proponents, select the radio button that states all addenda will be sent to proponents. See section 1.4 for more information on when to post on BC Bid. For answering questions, a template for SRFP addenda is [available online](#), or you can use your existing organizational addenda template.

SRFPs can include a cut-off date for questions, but this is not a requirement. Keep in mind that proponents will take some time to fully understand the SRFP requirements, and may not realize that they have a question until they are well into the development of their proposals. It is possible that a very important question could be asked close to the Closing Date and Time; if the cut-off for questions has passed, the Province is in the awkward position of answering a question that was received outside of the SRFP process, or ignoring a question that proponents should have answered.

If not including a cut-off date for questions, the SRFP states that the Province "may" answer questions. This means that if a question is received too close to the Closing Date and Time, the Province has the option of not answering it even if no cut-off date was mentioned.

If a cut-off date for questions is included, check the box and identify the number of business days before closing when this cut-off applies. If a good question is received after the cut-off, the Province has the option of extending the Closing Date and Time so that the question can be answered before the cut-off.

3.11. Section 4: Requirements for Proposals

This section references the SRFP Proposal Form that proponents **must** use. This is a mandatory requirement of the SRFP; if any other format is used, the proposal cannot be considered or evaluated. The wording of section 4 cannot be changed.

3.12. Section 5: Mandatory Requirements

The mandatory process requirements for all SRFPs are stated in the online SRFP Rules (see section 1.2). If an additional mandatory requirement applies, click the check box in this section and identify what it is. Only ONE additional mandatory requirement can be included in the SRFP, if needed. If no additional mandatory requirement is required, do not check the box; the SRFP will then only reference the mandatory requirements in the SRFP Rules.

Remember that no points are allocated to mandatory requirements – they are simply pass/fail criteria. Therefore, do not include any additional mandatory

Key Point: Only ONE additional mandatory requirement can be included in your SRFP. DO NOT confuse mandatory requirements for the SRFP process (i.e. those that all proponents must meet) with mandatory requirements of the contract (i.e. those that only the contractor must meet).

requirement unless it is critical to the success of the contract AND proponents exist who have the ability to meet it. If uncertainty exists about the critical nature of the mandatory and/or proponents' ability to meet it, change it to a desirable criterion that can be scored (see section 3.22 below for more information).

If a mandatory requirement is added to the SRFP, use caution in the wording. Avoid subjective words, such as "demonstrate", "reasonable", "logical", "satisfactory", etc., as these words have different meanings to different people. Instead, use factual and clear words, where meeting or not meeting is a clear distinction rather than a judgement call. Also consider how a mandatory requirement could be technically met, but still not meet the requirements of the Province. Following are some examples of mandatory requirements that should not be used, and how to improve each:

Instead of:

"Proponents must have demonstrated the ability to manage large volumes of monthly intakes."

Try:

"Proponents must have experience within the past five years (as of the Closing Time) of managing an average of 30 intakes per month over no less than a six month period."

Instead of:

"Proponents must have the xyz certification."

Try:

"Proponents must have a valid xyz certification as of the Closing Time of this SRFP. The Contractor will maintain this certification over the term of the Contract."

Instead of:

"Proponents must have three years' experience delivering similar services"

Try:

"Proponents must have twelve months or more experience within the past five years (as of the Closing Time) delivering video production services for a public sector entity (federal, provincial, state or municipal government)."

In each of the above examples, the subjective words have been replaced with clear measures, thereby avoiding a situation where a proposal may or may not have met the mandatory requirement depending on interpretation.

DO NOT confuse mandatory requirements for the SRFP process with mandatory requirements of the contract. If something absolutely must be in the contract, include it in the SRFP section 1 Contract Services (see section 3.8 of this Guide for more information). Only a requirement that all proponents must meet in order to qualify for evaluation is identified as a mandatory requirement of the SRFP.

3.13. Section 6: Proposal Evaluations

3.13.1. Weighted Criteria and Minimum Scores

Proponents require information on the relevant importance of the information that they are asked to provide. The table in section 6 of the SRFP discloses the value of each category of requirements.

Typically, the "Weighted Criteria" table is designed from a total of 100 points, but ministries can choose a different overall amount if they wish. An important element of this table is that once the SRFP is published, the overall weightings cannot change – how they are allocated within each category can be

adjusted up until proposals are opened (see section 10 of this Guide for more information on the evaluation process), but the overall weightings in each category must match the SRFP.

The SRFP template is designed using three categories; typically, these categories are Experience, Approach, and Price. Ministries can change the Experience and Approach titles, noting that the headings used in the table will automatically be used in the SRFP Proposal Form and vice versa. Ministries can delete the Price heading, or can use the drop-down menu to select Budget if the budget will be evaluated rather than price. However, the SRFP cannot be issued without at least two headings. If using three headings, the third will always be either Price or Budget. More information on whether or not price or budget should be evaluated can be found in sections 3.12.2 and 3.12.3 of this Guide.

There are no hard-and-fast rules about what the allocation of points should be. Ministries can use their own discretion; however, be aware of the potential implications of these choices. For example, if Proponent Experience is weighted very high and Price rather low, this will likely result in a successful proponent who is more experienced but also more costly than others. If the Approach section is weighted low, the successful proposal may have a vague description of how services will be delivered, which may be difficult to translate into an effective contract.

Minimum scores can help with the allocation of points, as a proposal must meet all minimum scores in order to be considered for the contract. Minimum scores are not required for all SRFPs – many RFPs and SRFPs do not use them – but they do give some flexibility in how points can be allocated. For example, if the proposed Approach is critically important, this section should be weighted high. Proponent Experience may not be as important, but the ministry likely does not want a successful proponent with little or no experience. In this case, Approach can be heavily weighted (e.g. 50 points), and Proponent Experience lightly weighted with a minimum score (e.g. 20 points with a minimum of 12). Minimum scores cannot exceed the maximum weight allocated to a section, and no minimum score can be applied to Price. Price should never have a minimum score, as it is usually a comparison between one proposal to another (see section 3.13.2 below for more information).

If minimum scores are used, they are usually no more than 60% of the available points for that category. For example, if Proponent Experience is worth 17 points, the minimum score should be no more than 10 points. If a higher minimum score is used, a significant risk exists of having no proponent meet it. Ministries do not have the option of changing the minimum score after the proposal evaluations have begun – the Province is bound to the SRFP Rules and the process described in the same manner that the proponents are. Be careful about including more than one minimum score, as this creates a risk of no proposal meeting all minimum scores. If using multiple minimum scores, consider having one at 60% of the available points in that category, and the other at just 50%.

If minimum scores apply, the smart form will not allow percentages to be used as this can confuse the reader as to what the minimum score means (e.g. a percentage of a percentage). Instead, use whole numbers to indicate what each category is worth, and what minimum scores apply (if any).

If minimum scores apply, the box indicating the need to meet minimum scores will be automatically included.

3.13.2. Price Evaluations

No requirement exists to evaluate price, but most SRFPs will likely include this. See below for reasons and circumstances where price may not be evaluated or may not have points allocated to it.

The evaluation of Price needs to be carefully considered and clearly worded in order to ensure fairness to all proponents. The SRFP describes how price will be evaluated, if applicable; what price is to include will be described in the SRFP Proposal Form (see section 4.8 for more information).

The first decision to be made is whether the ministry is looking for proponents to provide a single price, or if multiple prices are required, or if price is not being requested and/or evaluated at all.

a) Multiple Prices:

For multiple prices, check the box and explain how price will be evaluated. For example, the points allocated to price could be divided amongst the different prices being requested. This means that a single proponent could propose the lowest price in one or some of the prices, but not all. This approach works whether each price is an overall price, unit price, or if a mix applies. Alternately, if several unit prices are requested, each proposed price in a proposal could be inserted into a sample year's purchase and the overall cost of that year could be used for evaluation purposes.

Following is sample wording that can be edited to suit a SRFP where multiple prices are being requested; insert the appropriate wording in the field asking for an explanation on how multiple prices will be evaluated:

Separate Evaluations: *"The SRFP Proposal Form requests multiple prices to be proposed. Each price will be evaluated separately."*

Sample Year Evaluation: *"The SRFP Proposal Form requests multiple unit prices to be proposed. Each unit price will be inserted into a scenario of a sample year's purchase. The overall cost of the scenario for each proposal will be used to evaluate price."*

b) Single Price

For single prices, SRFPs can request either an all-in price or unit price. If the ministry knows exactly what and how much is being purchased, a single price should be used (either a fixed, firm all inclusive price, or a fixed, firm all inclusive annual price). If what is being purchased is known but how much may be required is variable, unit pricing can be used (e.g. hourly rate, per seat cost, usage rate, etc.).

In either case, the details of what constitutes the price will be explained in the SRFP Proposal Form; for the SRFP, just be sure that the box for multiple prices is NOT checked.

c) Evaluating Price

If price is being evaluated, the SRFP needs to explain how regardless of whether one or multiple prices are applicable. Following are some of the choices available through the radio button options, noting that only the formula options require points to be allocated to price (see section 3.13.1 for more information on allocating points):

- **Standard Formula:** The lowest price receives all the points allocated to price (or to that portion of price), and everyone else is scored on how close they came to the lowest price. The formula used is *lowest price / this price x points allocated*; this formula results in a proposal being awarded half the available points if it is twice as expensive as the lowest price. If multiple prices are requested, this formula would be applied to each price (if they are evaluated separately), or to the typical year's purchase price, as described in the SRFP. Points must be allocated to price if using this option.
- **Another Formula:** This approach works exactly the same as the Standard Formula option, except that the SRFP writer inserts the formula that will be used. The formula should ensure

that the lowest price evaluated is awarded all the points allocated. Points must be allocated to price if using this option.

- **Price-per-point:** This approach works only when a single price is proposed, or where a typical year's purchase is being used. It does not work for multiple prices that will be evaluated separately. Proponent Experience and Approach are evaluated (and, if applicable, Budget), and no points are allocated to price. Instead, the price is divided by the overall points awarded for the other sections of the SRFP (e.g. Experience and Approach). The award is made to the proposal with the lowest price-per-point. DO NOT assign points to price if using this option.

d) Price is not evaluated

Two options exist if price is not being evaluated: either price has no impact on the score, or the award will be made to the lowest price that has met all mandatory requirements and minimum scores.

If price has no impact on the score, click on the radio button that says "Price will not be evaluated". Provide an explanation in the appropriate field as to why price is not being evaluated. For example, the contract value may be predetermined, where the ministry is looking for proponents to provide as much as service as they can for the dollars available. Alternatively, the unit price for services may be prescribed through the applicable program.

Alternately, another radio-button option is to award the contract to the lowest price that has met all mandatory requirements and minimum scores. In other words, the ministry has determined that there are insufficient differences in service delivery to justify spending more once the basic requirements are met. This option can only work if a single price is being evaluated (either as a single price or a sample year), and at least one minimum score is identified.

Do not assign points to price if price will not be evaluated. Either delete the row for price in section 6 of the SRFP, or select the "Budget" option (see section 3.13.3 below).

e) Other

If none of the options identified for price work for a particular SRFP, select "Other" and provide an explanation in the text field how price will be evaluated. This option can be selected whether or not points are allocated to price.

3.13.3. Budget Evaluations

In some cases, assigning points to price is not useful (i.e. price is not being evaluated, or a methodology is being used where points are not allocated to price), but evaluating a budget is useful. For example, some contracts have a predetermined contract value, where the ministry is looking for the best services it can find for the money available. If this applies, select "Budget" from the drop-down menu in section 6 of the SRFP and assign points accordingly. In this section, select one of the options for price where no points are assigned (e.g. "Price will not be evaluated", or "Contract award will be offered to the Proponent with the lowest price that has met all mandatory requirements and minimum Scores" or "Other", assuming the process described does not include points being assigned to price).

Be cautious if selecting this option. Consider carefully what benefit may be derived from asking for the budget, noting that the SRFP Proposal Form will need to include a description of how this information will be evaluated. Note that if the budget is requested as part of the proposal, changes may not be possible as part of the contract finalization process (advice from Legal Services Branch should be sought,

in this case). If negotiating the budget as part of contract finalization is desirable, do not ask for it in proposals.

3.13.4. Assumptions

For some SRFPs, proponents will be required to base their proposals on assumptions that may or may not be the reality in the contract. If this applies, click on the box for this option and define these assumptions. Examples of assumptions that may be required include, but are not limited to the following:

- Minimum quantity of goods and/or services that may be purchased, noting that there is no guarantee that this minimum quantity will be reached.
- The latest date that the contract is expected to be signed, noting that unforeseen circumstances may result in delays.
- Dependencies on other ministry activities / programs or other contractor's work that may impact the SRFP contract.
- Maximum time that the ministry needs to approve the contractor's work and next steps.

If assumptions are necessary, be clear on what will happen if the assumptions are not correct. For example:

- If a minimum quantity is not purchased, the contractor will be entitled to invoice a surcharge to the ministry, not to exceed an amount or percentage disclosed in the SRFP.
- In the event that the contract is not signed by the date disclosed date, dates proposed will be adjusted to reflect the delay.
- Any delays due to missed target dates in programs / processes outside the Contractor's control will result in negotiating new milestone dates, as agreed between the Contractor and the Province.
- If ministry approval processes exceed the maximum indicated, any subsequent milestone dates for the Contractor will be adjusted by an equal number of days.

4. WRITING THE SRFP PROPOSAL FORM (APPENDIX A)

Appendix A, the SRFP Proposal Form, has been designed to clarify what the Province expects and to simplify the process of creating a proposal for the proponents. Proponents must use this form for their proposals; any other format will result in missing a mandatory requirement and the proposal must be rejected.

When completing the SRFP Proposal Form (as well as the SRFP itself – see section 3 above), be sure to read the definitions in the SRFP Rules. When using these words in their defined meaning, capitalize the defined words and terms. However, the words “must”, “mandatory”, “should” and “desirable” are always used as they are defined; select different words if the defined meaning is not intended.

Appendix A, the SRFP Proposal Form is a smart form template, meaning that some portions of the document cannot be changed, other portions are to be completed by the SRFP writer, and still other portions are to be filled out by the proponent. Sections that proponents are to complete are shaded blue in the working copy view of the SRFP Proposal Form; SRFP writers will not be permitted to insert any language into these blue fields.

Note that some fields in the SRFP Proposal Form are taken from the SRFP itself; if changes are needed to these fields (e.g. SRFP name or number), make the change in the SRFP. Such edits will automatically appear in the SRFP Proposal Form.

Remember that while developing the SRFP and the SRFP Proposal Form, the smart form will appear to be one document. When the final version is saved, two documents will be created – the two-page SRFP and the SRFP Proposal Form. The final versions of these documents need to be saved using different names, and both need to be either posted on BC Bid or sent to selected vendors (see sections 5 and 8 for more information).

Use this section of the Guide in conjunction with the SRFP Proposal Form template. **The SRFP Proposal Form is NOT restricted to two pages.**

Key Point: Ministries complete several sections of the SRFP Proposal Form prior to finalizing the SRFP documents.

4.1. Header, Issue Date and Closing Time

The Headers, including the SRFP number and title, the issue and closing dates, and location, will be auto populated from the completed SRFP, to ensure consistency between these documents. If changes are needed, make these changes in the SRFP part of the smart form.

4.2. Requirements

This section is hardwired into the SRFP Proposal Form, meaning that the wording cannot be changed by the SRFP writer. It includes instructions for proponents to not include attachments or website URLs to their proposal unless specifically requested in the SRFP. As the SRFP writer, be clear when filling out sections 5 and 6 of this Appendix on whether or not attachments or URLs are required and if allowed, what they should specifically reference.

Vendors have indicated an interest in having a maximum page count included in the SRFP process. This ensures that proposals are kept small, as proponents know that all their competitors are working within the same limitations. Without a page limit, proponents tend to provide more than is requested as they are concerned that their competitors will be doing the same and that the Province will award higher scores for this additional information.

If a maximum page count is included, check the box for this option and indicate the maximum number of pages, but be reasonable on what is requested. Confirm the maximum page count after the SRFP Proposal Form smart form is substantially ready, to be sure that all the information requested can be provided within the limitation imposed. Ideally, the maximum page count indicated should be several pages higher than the ministry estimate, and will include the entire SRFP Proposal Form, exclusive of any appendices or URLs requested. For most SRFPs, the maximum page count should be between 10 and 20 pages.

If a maximum page count applies, the Province can accept a larger proposal, but anything past the maximum page allowance will not be read or evaluated (noting that URLs and/or appendices are not part of the page count, if the SRFP specifically requested proponents to provide any of them). This approach will not exclude a proponent from consideration due to the size of their proposal, while ensuring that the Province does not need to evaluate larger proposals. However, even if a proposal is only half a page past the maximum page count, that half page cannot be considered.

4.3. Section 1: Additional Mandatory Requirement

If no additional mandatory requirements apply, the smart form will default to the appropriate radio button indicating that this section is not applicable.

If an additional mandatory requirement does apply, the smart form will automatically click the radio button indicating this and will auto populate the mandatory requirement from the SRFP. However, the SRFP Proposal Form needs to explain how the mandatory requirement will be demonstrated as being met. The SRFP Proposal Form gives two options – use the appropriate radio button to indicate that additional instructions are needed, or that the mandatory is addressed in another section of the SRFP Proposal Form.

If additional instructions are required, following are some examples on how such instructions can be worded:

Example 1: If the mandatory requirement states: “Proponents must have a valid xyz certification as of the Closing Time of this SRFP. The Contractor will maintain this certification over the term of the Contract.”

Insert one of the following instructions:

“Indicate whether or not the Proponent has the xyz certification, and the dates that this certification is valid. Any proposal that does not indicate current certification that is valid as of the Closing Time of this SRFP will be rejected as missing this mandatory requirement.”

OR

“Indicate whether or not the Proponent has a valid xyz certification as of the Closing Time of this SRFP. Before signing the Contract, the successful Proponent will be required to provide a photocopy of this certification. Failure to produce a copy that clearly indicates validity as of the Closing Time of this SRFP will result in the Province revoking the offer to contract with that Proponent, and may result in an offer to the next highest scoring Proponent.”

OR

“Provide a copy of the Proponent’s current xyz certification as an appendix to the proposal. Any proposal that does not include this copy will be rejected as missing this mandatory requirement.”

Example 2: If the mandatory requirement states: “Proponents must propose to deliver services within the School District 61 Greater Victoria boundaries (see <https://documents.sd61.bc.ca/pdf/sd61map.pdf> for more information).”

Insert the following instructions: “Provide the address from which services are proposed to be delivered. If no address is provided, or if the address is outside of the School District 61 boundaries, the proposal will be rejected as missing a mandatory requirement.”

Following the instructions provided to proponents is a blue text box that is intended for the proponents’ response to the mandatory requirement. SRFP writers cannot insert anything into this text box.

If the mandatory is addressed in another section of the SRFP Proposal Form, select this radio button and insert the section where it will be addressed. This may be applicable to a mandatory requirement regarding minimum experience, maximum price that can be bid, etc. Proponents should be reminded to address the mandatory requirement in the applicable section.

4.4. Section 2: Proposed Subcontractors

This section provides only two options for the SRFP writer: subcontractors are either acceptable, or they are not. Select the appropriate radio button, and otherwise no changes can be made to this section.

If subcontractors are allowed, a proponent can include subcontractors if they wish whose experience can then be included in the Experience section (if applicable). If the successful proposal includes subcontractors, the final contract will be with the proponent only, who will be responsible for all deliverables including those being delivered by the subcontractors.

For almost all contracts, subcontracting should be acceptable. However, if a ministry has a clear rationale as to why this will be problematic, the SRFP can restrict proponents from using subcontractors. The rationale should be well documented for the file, as proponents may ask for it (the rationale is not needed for the SRFP Proposal Form

itself). For example, if the ministry is looking for a single individual to deliver the services, the ministry could decide to allow no subcontracting in order to avoid any markups on the individual's rates.

4.5. Section 3: Executive Summary

This section cannot be changed in the SRFP Proposal Form, as the blue text box is intended for proponents only. Proponents are interested in providing executive summaries, highlighting the key points and advantages in their proposals. The SRFP Proponents' Guide advises proponents to be succinct, and not to exceed 500 words. However, there is no restriction to this, and actual summaries may be longer.

4.6. Section 4: Insert Heading (Experience)

Section 4 has been developed to specifically address experience, as a proponent's experience is an important element of SRFPs. However, not all SRFPs will need to evaluate experience, particularly if the SRFP is being directed to vendors who are known to be qualified. Therefore, the smart form gives the SRFP writer two options – either experience will be evaluated or it will not be. Select the appropriate button, and the smart form will display only those options that apply.

If experience is not being evaluated, select the radio button for experience not being evaluated and go to section 4.6.4 for more instructions on how to complete this section of the SRFP. Otherwise, this section of the Guide assumes that experience is being evaluated.

The heading of this section is connected to the table in the SRFP – the SRFP writer can change that heading either here or in section 6 of the SRFP to make the change in both places. Examples of appropriate headings include, but are not limited to, "Proponent Experience", "Individual's Qualifications and Experience", "Proponent Capacity", etc.

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

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

The information requested in this section is the minimal experience proponents should have; a proponent who describes more experience than the minimum expected should score higher in this section. However, an upper limit of experience should be identified to ensure that proponents do not describe, for example, 30 years of experience when maximum points are awarded with experience limited to only the past 10 years.

If the SRFP allows proposed sub-contractors, their experience can be cited for this section and will be evaluated the same as the proponent's experience.

4.6.1. Proponent Organizations' vs Individuals' Experience

SRFPs are designed to evaluate only one of the following options:

- Proponent organization;
- One individual; or

- A team of individuals.

Choose which of the above options is most desirable for the resulting contracts, and clearly indicate this in the SRFP Proposal Form (i.e. in the heading chosen for this experience, and in the instructions). However, be prepared for proposals to be structured somewhat differently. For example, the SRFP may ask for proponent organization experience, but a single owner-operator consultant may apply using their personal experience to address the requirements of the SRFP. The opposite is also a possibility, where individual experience is being sought but a proponent responds with corporate information.

Consider the following when deciding which of the three options should be evaluated:

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

If choosing this option, consider wording similar to the following describing how evaluations will take place:

“This SRFP is seeking information on the experience of proponent organizations and their proposed sub-contractors, if applicable. If the proponent or proposed sub-contractor is a single owner-operator, the experience of that owner-operator will be considered. Otherwise, the experience of individuals will not be evaluated.”

- **One Individual:**
 - Only one individual is needed, or one individual’s experience is critically important to the success of the contract;
 - Contract success is highly dependent on specific expertise that is not commonly found; and
 - Individuals who are sole owners/operators (e.g. consultants) are equally acceptable to individuals who work for companies.

Following is sample wording that can be used to describe how this option would be evaluated:

“The SRFP is open to both single owner-operator consultants as well as firms. However, only the experience of the individual proposed will be considered when evaluating this section, regardless of where this experience was gained. Organizational experience that did not involve the named individual or where the named individual’s role is unclear will not be considered.”

If evaluating a single individual, be sure to click on the box in the smart form for “Include list of named individuals”. This will insert a box that proponents are to complete with this name(s). On the next line, insert the number “1” as the maximum number of individuals that can be proposed, which will limit the proponents to naming only one person. Alternately, do not insert any number if proponents are able to propose a single or multiple people for this role.

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

Suggested wording for this option:

“The experience of the individuals proposed for the team will be evaluated for this section, regardless of where that experience was earned. Corporate experience that did not involve any of the proposed team members or where the role of the proposed team members is unclear will not be considered.”

If evaluating a team of individuals, be sure to click on the box in the smart form for “Include list of named individuals”. This will insert a box that proponents are to complete with this name(s). On the next line, insert a number for the maximum number of individuals that can be proposed, which will limit the proponents to no more than that number. Alternately, do not insert any number if proponents are able to propose any number of people for the team.

4.6.2. **Years of Experience vs Number of Projects**

Regardless of whether the SRFP is evaluating the experience of proponent organizations, individuals, or teams of individuals, the ministry needs to identify what and how much experience would meet basic requirements.

The SRFP Proposal Form can be structured for a minimum number of projects, or years of experience within a specific timeframe that meets the definition of “similar scope and complexity”. Following is a description of when and how to each of these approaches.

- **Years of Experience**

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

First, determine the minimum amount of experience that demonstrates the basic skills and abilities needed. Describe this experience as months rather than years, since a proponent could interpret “years” to mean calendar years. For example, if the SRFP states that proponents should have three or more years’ experience, a proposal may state that a project beginning in December of 2012 and ending in January 2014 meets the requirement as it applies to three calendar years. However, this same project would not work if the requirement was for 36 months or more experience.

Be sure to put a maximum time limit on what experience will be considered – e.g. 36 months or more experience within the past seven years as of the Closing Date and Time. Without this, you may receive a proposal from a proponent who had excellent experience from 20 years ago, which is likely too long ago to demonstrate their current abilities. This time limit also means that any experience past the time frame specified will not be evaluated; this will save time for both proponents and the ministry, as not all relevant experience for the past 20 years needs to be described or evaluated. This approach also defines how a proponent would score 100% of the points allocated to experience. For example, if the upper limit is within the past seven years, a

proponent that has experience in all elements of “similar scope and complexity” for all of the past seven years scores 100% of the available points.

Define what similar scope and complexity means, using a numbered list. Examples that can be used to define “similar scope and complexity” include the following (noting that these examples are for a variety of different services that would not be used together):

“Proponents should have 36 months or more experience within the past seven (7) years (as of the Closing Time of this SRFP) delivering services of a similar scope and complexity. Similar scope and complexity may include without limitation:

- a) Delivering prevention, early identification and intervention, and risk reduction services which reduced the likelihood of mental health problems in children and youth;
- b) Managing no less and 40 calls on average in each 24-hour period, as measured over no less than a twelve-month period;
- c) Utilizing a team of resources with no less than six individuals, including at least one with formal education in project management and one with formal education in computer science or related disciplines; and
- d) Delivering adult education courses on workplace topics, such as but not limited to Having Difficult Conversations, Discrimination Prevention, Anti-bullying, and Effective Communication.”

Be aware that a proponent could have had simultaneous projects that meet the experience being sought. The SRFP needs to explain how overlapping dates will be managed. If simultaneous experience will be counted only once for years of experience, adapt the following language to make this clear:

“When evaluating experience, dates that overlap will be considered only once. For example, if Project A was delivered from September 2011 to March 2013 (19 months overall) and Project B was delivered from April 2012 to March 2015 (36 months overall), the overall experience evaluated will be from September 2011 to March 2015, or 43 months overall.”

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

“When evaluating experience, dates that overlap will be considered individually. For example, if Project A was delivered from September 2011 to March 2013 (19 months overall) and Project B was delivered from April 2012 to March 2015 (36 months overall), the overall experience evaluated will be the sum of these projects, or 55 months even though that experience was gained within 43 months overall”

- **Number of Projects**

This approach works particularly well if the experience being sought is likely shorter-term and/or part time work. For example, experience in services such as facilitation, expert advice consultations, website design, etc. was likely gained by working on multiple projects simultaneously. For these types of services, evaluating projects can be easier and the SRFP Proposal Form can include instructions to limit the maximum number of projects that will be considered. However, proponents may include more than the maximum number of projects. In this case, the instructions should be clear on the consequences, if any exist (e.g. “The Province will only evaluate

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

Determine the minimum number of projects that would demonstrate the basic skills and abilities needed. Be reasonable in the number requested, as this will directly affect the size and evaluations of the proposals received. Remember that the SRFP process is not seeking to know all relevant experience, but rather the best examples that demonstrate the proponent’s abilities.

Be sure to put a maximum time limit on when the projects were delivered so as to avoid experience from so long ago that it does not demonstrate current abilities.

Define what similar scope and complexity means, using a numbered list. Be specific to each project; do not use “years of experience” in this definition, as it is inconsistent with the description of a single project. However, the definition could be a minimum length of time from start to finish.

Examples that can be used to define “similar scope and complexity” include the following, adapted from several SRFPs that have been posted on BC Bid:

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

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

4.6.3. Experience Tables

Whether evaluating years of experience or number of projects, the tables are ideal to assist proponents in understanding what should be addressed in their proposals.

The instructions prior to the table in the smart form is an example that can be copied and edited to suit the specific SRFP. Note that the actual instructions need to be inserted into the text box, as the instructions will disappear in the Preview mode and final version of the SRFP.

If evaluating individuals’ formal education or qualifications, be sure to include instructions telling proponents where to provide this information (e.g. as part of the narrative in the first table).

If using number of projects to demonstrate experience, simply change the numbers to match the minimum and maximum number of projects expected. If using years of experience, the following instructions can be adapted for the specific SRFP:

“Describe up to **x** projects that the Proponent and/or proposed subcontractor(s) have completed within the past seven (7) years (as of the Closing Time of the SRFP) that includes all the information requested below.”

The SRFP writer has the option of limiting the number of tables that a proponent could include in their proposal. If no such limit is applied, proponents will be able to add as many tables as they require to demonstrate that they meet or exceed the experience being sought. If a limit has been imposed, the SRFP Proposal Form smart form will not allow proponents to include any more than the maximum number stated. Therefore, it's critically important to use sound judgement as to how many tables will be allowed.

The blue text fields in the table are for the proponents to complete; SRFP writers cannot insert anything in these fields. If the SRFP allows subcontractors, the second row will allow the proponent to name those subcontractors. If subcontractors were not allowed in the SRFP, this option disappears in the SRFP Proposal Form.

The fifth (or fourth, if sub-contractors are not allowed) row, includes both hard-wired language that cannot be changed, as well as the option for one or more text boxes of additional information specific to this SRFP. If more direction is needed, insert those instructions in the white text field. If more than one instruction is needed, use the add button to insert more rows. Use the delete button to remove any that aren't needed. In particular, use these bullets to request proponents to submit URL addresses and/or appendices as part of their proposal, if this is valuable to the evaluation process. For example, experience may be demonstrated via sample documents that the proponent wrote, web pages that the proponent developed, graphics that the proponent designed, etc. If requesting URLs or appendices, be clear what these URLs or appendices are to address. Note that URLs and appendices cannot be considered unless they are specifically requested. If additional instructions are not needed, do not insert anything in the text fields and they will disappear in the Preview mode and the final version of the SRFP Proposal Form.

The remaining two bullets are hard wired and cannot be changed, as proposals should always address deliverables, measures, timelines and end results.

The blue text box after the table is intended for proponents' use only.

4.6.4. Not Evaluating Experience

If the evaluation of experience is not needed (e.g. the SRFP is being directed to vendors who are on a List of Qualified Suppliers, or the contract value is under \$75,000 and is being directed to at least three known vendors), section 4 can be changed to suit.

If not evaluating experience, select the appropriate radio button in Section 4. This will remove the experience tables, and will provide three text fields instead. Use an appropriate heading that describes what will be evaluated; any changes made to the heading in section 4 of the SRFP Proposal Form will automatically update the table in section 6 of the SRFP.

In the first text box, describe what is being evaluated. For example, if facilities from which services will be delivered will be evaluated, language such as the following can be adapted for this text box:

“Proponents should propose to deliver services within the City of Prince George. This facility should include at a minimum a reception area, private offices for confidential client meetings, an activity room, and a kitchen / lunch area. The Province prefers this facility to be the Proponent's current location, but proposed locations are acceptable.”

The second text box is intended for instructions that will guide proponents on how to respond to what is being sought. In the example above, example instructions might be:

“Provide an address from which the services are proposed to be delivered, and identify whether or not this is the Proponent’s current location. If this is not the Proponent’s current location, explain what has been done to secure this facility in the event that the proposal is successful. Provide a floor plan or description of the facility, clearly explaining how it meets or exceeds the description above.”

The third text box – the blue one – is intended for proponents to complete. Nothing can be inserted into this box while the SRFP is still in the working copy mode.

4.7. Section 5: Insert Heading (Approach)

SRFPs should direct proponents to describe how they intend to deliver services (i.e. the approach to service delivery); however, do not attempt to include everything that may form part of the contract deliverables. Instead, focus on the critical elements where the proposed approach can be evaluated to differentiate the overall quality of proposals. Typically, this section is titled “Approach”, but other headings can be used specific to how services will be delivered.

The Approach section will require specific information that identifies the elements of service delivery that proposals are to address. Remember that this section is specific to how the proponent would deliver services if offered the contract; it should not address any past experience.

When developing this section, refer to the description of services developed for section 1 of the SRFP, Contract Services. Identify the critical elements of service delivery, where a description of how each would be delivered can be evaluated to differentiate proposals. Timelines can be included in this description, but be realistic on what can reasonably be achieved. This list should consist of 3 to 5 bullets overall. If URLs or attachments are needed for evaluating the proposed approach, specifically ask for them as part of the bullets.

If the SRFP will evaluate a team of resources (see section 4.6.1 for more information), one of the bullets should be the identification of who will be responsible for what parts of the proposed approach. This adds clarity for responsibilities and also allows the evaluators to consider whether the division of work is reasonable.

The instructions in this section encourage proponents to explain why their proposed approach will create efficiencies, increase quality or otherwise benefit the Province. Such “value add” elements of service delivery are intended to result in higher scores in this section if accompanied with a compelling rationale as to why the proposed value-add is feasible. These instructions are hard-wired into the smart form, and cannot be altered.

The blue text box after the instructions is intended for proponents’ use.

Remember that the deliverables in the final contract will be based on the successful proponents’ response to Section 5 Approach 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. Similarly, the Province is bound to any constraints about the contract identified in the SRFP, and will not have the option to make material changes during contract finalization. Although additional details may need to be articulated in the contract, none of those details can change what was stated in the proposal or SRFP.

4.8. Section 6: Price

Section 6 will be designed for either price or budget, or will not be included if removed from the table in section 6 of the SRFP. If not evaluating price or budget, no changes can be made to section 6 of the SRFP Proposal Form. If the SRFP is evaluating the budget rather than price, refer to section 4.9 below.

The SRFP Proposal Form offers three options for price: a single price, multiple prices, or another pricing methodology, to be defined by the SRFP writer. Using the radio buttons, choose the option that will be used, ensuring that the option used to matches exactly what was stated in the SRFP, section 6 Proposal Evaluations. This exact match is a critical component to ensure clarity on how price will be managed.

No matter which option is chosen, the SRFP Proposal Form must describe what the proposed pricing is to include, as price is usually evaluated by comparing proposals; the fairness of such comparisons can become an issue if the SRFP is unclear and some proponents include certain costs that others do not. For example, if travel applies to the contract, proponents will need clarity on whether the travel expenses should be included in the pricing proposed, or whether such expenses can be billed separately and in addition to the pricing proposed. See section 3.13.2 for more information on how price is evaluated.

If travel applies to the contract that can be billed separately, make this clear. This is important as proponents may be located anywhere in the world; the Province does not want to be in a position of paying for unexpected travel costs due to the contractor's location. For example, a proponent may assume that if they are located in Ontario, all travel costs for travelling to B.C. will be billable in addition to their fees. Therefore, the smart form has been designed to optionally allow the following instructions to proponents:

“The Province will not pay any costs or expenses in addition to the price proposed with the exception of pre-approved travel as specified by the Contract that must not exceed the Province's Group II per diem rates (see http://www2.gov.bc.ca/local/myhr/documents/travel/travel_allowances_app1.pdf for more information).”

If this language applies, click on the box to include it. In addition, the smart form can optionally allow a limitation on when travel is billable. By completing the text box for “Preapproved travel expenses only apply to travel that is requested by the Province, and that originates in ...”, the SRFP will insert this limitation. The text box should indicate the city or cities from which travel will be approved (e.g. Victoria or Vancouver).

Note that the SRFP will not allow group I rates for travel expenses.

On rare occasions, additional expenses may apply to the contract. If this is the case, click on the box to allow additional expenses and clearly describe (in full sentences) what costs are separately billable and the approval process for such costs. For example, the SRFP might state:

“Training room rentals are an expected cost of this Contract that will be paid by the Contractor. The Province will fully reimburse the Contractor for training room rental costs provided that the Province has provided written pre-approval that includes a maximum payable for these costs. Do not include the costs of training room rentals in the price proposed.”

The Province and proponents do not have the option to change the pricing proposed during contract finalization. If the successful proposal exceeds the available budget, the ministry cannot negotiate a lower price with this proponent, as this is generally considered a material change. Instead, the Province can either find the additional funding needed for the successful proposal, or can cancel the SRFP meaning that no one is awarded the contract. Cancelling and reissuing a procurement process must be very carefully managed and should only be considered in limited situations. If cancelling, the SRFP can be reissued but only if the scope of services is changed, which is likely needed in order to receive proposed pricing that fits within budget.

Following are instructions on how to complete each of the options available for price:

4.8.1. Single Price

Three options are available under the “Provide one” radio option: a fixed all inclusive price, an hourly rate, or a unit price. Select the appropriate choice.

If the fixed option or hourly rate option is chosen, nothing further is needed. If “unit price” is selected, define what a unit is; for example, a unit may be the services delivered for one year (i.e. an annual price), or one attendee / student enrolled in the program, or one hour directly working with a client, or a per call fee, etc.

No matter which option is chosen, decide whether or not travel and other expenses will apply that can be billed separately from the price proposed.

The text box within the table is intended for proponents’ use only.

4.8.2. Multiple Prices

Select the radio button that instructs proponents to provide one price in each of the unshaded cells. Again, decide whether or not expenses will apply that can be billed separately from the price proposed.

Additional rows can be added to the table, if needed. For each row, insert a full description of what price is to be included in the shaded cells. The blue cells in the table are for the proponents’ use only.

4.8.3. Another Pricing Methodology

Most SRFPs will use one of the first two options for pricing. However, if neither of those options are suitable, this option can be used. It is not structured, giving a wide variety of options on how it could be used.

For example, if price is not going to be evaluated, explain why. The rationale may be that the successful proposal will be the lowest priced proposal that has met all mandatory requirements and minimum scores. Alternately, the contract price may have been predetermined, and therefore proponents are not to propose a price. A third possibility may include a different methodology for evaluating price (i.e. one that doesn’t fit into the options available in the smart form) that will require a full description of how it works.

This option also includes a blue text box for the proponent to complete. If any information is needed from proponents for this section, be clear what they are to provide. If nothing is required from proponents for this section, make that clear in the description, as this box cannot be removed.

4.9. Section 6: Budget

Section 6 will be designed for either price or budget, or will not be included if removed from the table in section 6 of the SRFP. If not evaluating price or budget, no changes can be made to section 6 of the SRFP Proposal Form. If the SRFP is evaluating price, refer to section 4.8 above.

Budget is only an option if it was selected from the drop-down box in section 6 of the SRFP. If this option is chosen, the SRFP Proposal Form will default to the heading “Budget” and three text boxes will appear.

Insert how the budget will be evaluated. For example:

“The total available budget for this contract is \$60,000 per year. Proposed budgets will be evaluated using the following criteria:

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

The second box is intended for instructions to proponents on what to provide when responding to this section. For example:

“As an appendix to the proposal, provide an annual budget that identifies how the budget will be spent. At a minimum, the budget should include direct service delivery staffing costs, facility costs, supplies, and management and administrative costs. Include a description of any efficiencies that can be realized with the Proponent’s other service offerings.”

The third box is highlighted in blue, and is intended for the proponents’ use only. Depending on the nature of the instructions given, proponents would either insert their response in the box, or would insert “see attached” and attach an appendix (only if one was specifically requested).

Be cautious if selecting this option. Remember that if the budget is requested as part of the proposal, changes may not be possible as part of the contract finalization process (advice from Legal Services should be sought, in this case). If negotiating the budget as part of contract finalization is desirable, do not ask for it in proposals

4.10. Section 7: Confirmation of Proponent’s Intent To Be Bound

The Confirmation of Proponent’s Intent To Be Bound identifies who the proponent is, and binds that proponent to the proposal submitted. 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 use their legal name when completing section 7 of the SRFP Proposal Form, although the Province can accept a proposal that uses a “doing business as” name.

This section includes the optional Business Number (federal GST/HST number) field. Those proponents that have a Business Number can record it 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. More information about the Business Number is available on the BC Registries website: <http://www.bcbusinessregistry.ca/business-number.htm>.

By submitting a proposal, proponents are agreeing to be bound by all the terms and conditions (the “SRFP Rules”) found [online](#).

All of the information required for Section 7 are to be completed by proponents; ministries cannot make any edits or changes to this section of the SRFP Proposal Form.

5. FINALIZING THE SMART FORM

Once both the SRFP and the SRFP Proposal Form are complete, it will need to be saved in its final format. After this final save, the SRFP writer now has two pdf documents ready for posting on BC Bid or for distributing to selected vendors.

The smart form functionality is quite complex, and therefore some issues may occur when saving the final documents. By following these instructions when saving a final version of the SRFP, most major issues can be avoided. In particular, these instructions will easily enable you to make further changes after the final versions have been saved, if required. If you are certain that no changes will be required to the working copy, begin at step #3.

1. Save the SRFP as a working copy, being sure to use a file name that makes it clear that this is the last working copy before final. This is the version that you can return to in the event that additional changes are needed after finalizing the SRFP.
2. Save the SRFP as a working copy again, using a file name that indicates this to be the version that will become the final documents. If changes are needed to the final version of the SRFP documents, **DO NOT** use this file, as issues may occur with mandatory fields.

3. Go into “Preview” mode and click on “ctrl S”, which re-saves the final working copy using the same final name that was created last. If all required fields are completed, the “Save Final Version” button is now activated. Click on this button.
4. A pop-up box will appear, notifying you that the SRFP will save as two files (SRFP and SRFP Proposal Form). Be sure to name these documents differently from each other.
5. Exit from all the final documents, and re-open them. Review the final versions to ensure that they include all information needed.

If any required fields have not been completed or if section 1 Contract Requirements of the SRFP is too long, the smart form will give an error message and will highlight in red what is needed. Go back to the working copy mode to make these edits and repeat the process above.

If you have saved a final version and need to make further changes to the document, go back to the last working copy saved BEFORE the working copy that was saved as final, make the necessary changes, and repeat the above process. If you do not have a working copy that was not converted to the final version, go back to the last working copy but note that you may have issues with mandatory fields. The smart form may indicate that all options are mandatory (i.e. all will be highlighted in red) even though one of the options was selected. In this case deselect and reselect the options needed, noting that any text associated with an option should be copied first, as it will disappear once the option is deselected.

Once you have saved a final version, changes to ministry-only fields will no longer be possible, and all of the proponent fields will become enabled, allowing vendors to respond to the SRFP. Please note that you must only post the “final” version of the SRFP, because vendors will not be able to respond to working versions of the document (proponent fields will be locked).

6. USING THE SRFP FOR LISTS OF QUALIFIED SUPPLIERS

The SRFP can be directed to those vendors on a List of Qualified Suppliers, although other options are also available for these Lists. All the information found in this Guide applies to these SRFPs, as well as the following specifics:

1. Lists of Qualified Supplier can only be used in the manner that was described in the relevant Request for Qualifications (RFQ). For example, if one ministry released the RFQ, they are the only ministry that can use the resulting List unless the RFQ specifically stated that the List will be available to other ministries. Similarly, all Lists are developed for certain types of services that are described in the RFQ; the List cannot be used for different types of services, even if they are similar. Finally, RFQs specify how Qualified Suppliers will be selected for contracts, which is usually dependent on the dollar value; be sure that the SRFP process is consistent with this process.
2. Normally, opportunities that are restricted to a List of Qualified Suppliers are not posted on BC Bid. Instead, the solicitation documents are sent directly to the Qualified Suppliers, usually via email although sometimes fax is used. Be sure to include the SRFP Rules as a separate file if sending via email, or as part of the fax. A link to the SRFP Rules is not sufficient. The SRFP Rules can be found [online](#),
3. If not posting on BC Bid, be sure to select options that remove all references related to it. E-bidding will not be an option, and all addenda will be sent directly to invited proponents.
4. When determining whether or not sub-contractors will be allowed to be proposed, consider that the proponents are invited to respond because they have been prequalified but potential sub-contractors likely have not been. Depending on the nature of the services, this may or may not be an issue given that the successful proponent who signs the contract will be responsible for all deliverables including those provided by any sub-contractors.

5. By virtue of being on the List, Qualified Suppliers have already demonstrated a certain level of competence and capacity related to the services described in the SRFP. If experience will be evaluated in section 4 of the SRFP Proposal Form, do not include anything that was already evaluated as part of the RFQ process. Additional expertise that is specific to this contract can be addressed, which may result in a small Proponent Experience section. Alternately, if the RFQ qualified vendors based on their organizational experience and capacity, the SRFP could evaluate the experience of individuals or a team of individuals. A third option is to not evaluate experience at all, and to select something else about service delivery that will add value. See section 4.6.4 of this Guide for more information.

7. DEVELOPING THE EVALUATION HANDBOOK

As with conventional RFPs, all SRFPs will require an Evaluation Handbook that is finalized prior to evaluating proposals. Ideally, the first draft of the Evaluation Handbook should be created prior to releasing the SRFP, so that any issues discovered can be corrected in the SRFP and SRFP Proposal Form prior to release.

Although any format of Evaluation Handbook can be used, the SRFP Evaluation Handbook template has been developed to maximize the documented support of decisions made while minimizing the amount of writing required by evaluators. Ministries are strongly encouraged to use this template. The SRFP Evaluation Handbook template is available [online](#).

The evaluation team should be determined prior to the SRFP closing, and should consist of individuals who, overall, have the necessary expertise and knowledge to fairly evaluate all aspects of the proposals. Evaluators can consist of a mix of government staff and contractors, but at least one evaluator must be from the ministry issuing the SRFP (see the [CPPM, section 6.3.3 \(b\) item 3](#)). Note that any contractors involved should sign a confidentiality agreement, and should clearly understand that they cannot be or be affiliated with any proponent.

All members of the team should have the opportunity to comment on and suggest edits to the Evaluation Handbook. In addition, a meeting should be held just prior to the Closing Date and Time to review the use of the handbook and to ensure that all evaluator questions are answered.

The Evaluation Handbook must be finalized prior to opening any proposals. Once the proposals are opened and evaluations have begun, no further changes can be made to the Evaluation Handbook, regardless of the format used. This ensures no perception (or reality) of adjusting the Evaluation Handbook to favour or exclude a particular proponent.

Following is guidance on how to complete all sections of the SRFP Evaluation Handbook template; use this section of the Guide in conjunction with the SRFP Evaluation Handbook template.

7.1. Section 1: Mandatory Criteria

The administrative mandatory criteria from the SRFP have already been included in the SRFP Evaluation Handbook template as items (a) through (d). If an additional mandatory applies, copy and paste it from the SRFP as line item (e). If no additional mandatory criteria apply, delete this line.

7.2. Section 2: Proposed Sub-contractors

If the SRFP allows sub-contractors, leave this section as is. If the SRFP has specifically excluded the use of sub-contractors, copy and paste the language used in section 2 of the SRFP Proposal Form and replace the instructions here.

7.3. Section 3: Executive Summary

There should be no edits required for this section; the information contained in the Executive Summary may be used in evaluating other sections, if applicable, but the Executive Summary itself is not scored.

7.4. Section 4: Experience

Change the heading of this section to match what was used in the SRFP. If evaluating experience, the information provided in this section must match exactly to the numbered list that defines “similar scope and complexity” in the SRFP Proposal Form. It must also match other aspects of the SRFP Proposal Form, meaning that it applies to either years of experience or number of projects, and is specific to the experience of one of the following three: the proponent organization, an individual, or a team of individuals.

Using the examples provided in section 4.6.2 item (a) of this Guide, following illustrates how this section of the Evaluation Handbook should be structured. This structure would be repeated for each of the criteria that define “similar scope and complexity”.

a) Delivering Services			
Within the past 7 years, the Proponent and/or it’s sub-contractor(s) have experience delivering prevention, early identification and intervention, and/or risk reduction services which reduced the likelihood of mental health problems in children and youth			
Within the past 7 years, the Proponent and/or it’s sub-contractor(s) have experience delivering prevention, early identification and intervention, AND risk reduction services which reduced the likelihood of mental health problems in children and youth			
Within the past 7 years, the Proponent and/or it’s sub-contractor(s) have at least 36 months experience delivering prevention, early identification and intervention, AND risk reduction services which reduced the likelihood of mental health problems in children and youth			
Within the past 7 years, the Proponent and/or it’s sub-contractor(s) have at least 60 months experience delivering prevention, early identification and intervention, AND risk reduction services which reduced the likelihood of mental health problems in children and youth			
The Proponent has experience for all of the past 7 years delivering prevention, early identification and intervention, AND risk reduction services which reduced the likelihood of mental health problems in children and youth			
The Proponent’s role was clear for at least 36 months of this experience (If point is not given, explain why in the comments section)			
Deliverables and timelines were clearly described for at least 36 months of this experience (If point is not given, explain why in the comments section)			
Measures were defined and appropriate for at least 36 months of this experience (If point is not given, explain why in the comments section)			
At least one reference was provided specific to this experience			
Total Score	[Sum]	5	[formula]

The above table would be repeated for each of the criteria listed in the SRFP Proposal Form, and each would be assigned its own maximum points. The sum of the maximum points for each section in Proponent Experience must equal the overall points allocated to this section in the SRFP.

When evaluating proposals, evaluators indicate a “1” in the second column of each line where the criterion was fully met, a “0” if it was not met, and “0.5” if it was partially or arguably met with an explanation in the comments column. The Excel Evaluation Handbook template sums these numbers to determine the weighted score.

In the Excel Evaluation Handbook template, the formula in the fourth column is already built in. However, be sure to update this formula by changing the last digit to the number of criteria listed. In the example above this would mean that the last number would be 9 as there are 9 criteria listed. If 6 of the criteria were met and the sub-section was worth 5 of the points allocated to Proponent Experience, the formula would automatically score this as $6 / 9 * 5 = 3.3$.

If the above example were specific to number of projects (e.g. two to four projects within the past three years) rather than years of experience, here's how the Evaluation Handbook could be structured:

b) Delivering Services			
Within the past 3 years, the Proponent and/or it's sub-contractor(s) have delivered at least one project that included prevention, early identification and intervention, and/or risk reduction services which reduced the likelihood of mental health problems in children and youth			
Within the past 3 years, the Proponent and/or it's sub-contractor(s) have delivered at least one project that included prevention, early identification and intervention, AND risk reduction services which reduced the likelihood of mental health problems in children and youth			
Within the past 3 years, the Proponent and/or it's sub-contractor(s) have delivered at least two projects that included prevention, early identification and intervention, AND risk reduction services which reduced the likelihood of mental health problems in children and youth			
Within the past 3 years, the Proponent and/or it's sub-contractor(s) have delivered at least three projects that included prevention, early identification and intervention, AND risk reduction services which reduced the likelihood of mental health problems in children and youth			
Within the past 3 years, the Proponent and/or it's sub-contractor(s) have delivered at least four projects that included prevention, early identification and intervention, AND risk reduction services which reduced the likelihood of mental health problems in children and youth			
The Proponent's role was clear for at least 2 of these projects (If point is not given, explain why in the comments section)			
Deliverables and timelines were clearly described for at least 2 of these projects (If point is not given, explain why in the comments section)			
Measures were defined and appropriate for at least 2 of these projects (If point is not given, explain why in the comments section)			
At least one reference was provided specific to this experience			
Total Score	[Sum]	5	[formula]

If minimum scores are used for this question, be careful how many criteria are listed for each element that defines "similar scope and complexity"; meeting the minimum score should not rely on having more than what was listed in the SRFP. In the first example above, the SRFP stated an expectation of 36 months experience meeting all of the items listed. A Proponent who had just 36 months experience in all items would therefore be awarded a full point for the first 3 criteria, and may or may not be awarded full points for the last four, depending on whether or not this information was provided. If the last four were all met, their overall score would be 7/9; if the overall available points were 5, this would result in a weighted score of $7/9 * 5 = 3.89$. If the minimum score for the Proponent Experience section overall is 60% of the available points, the example would enable a Proponent who

just makes the stated criteria to meet the minimum. However, the structure should also not allow a Proponent who falls far short of the stated experience to meet the minimum score. For this reason, the 6th, 7th and 8th listed criteria in the example require the minimum 36 months of experience in order to be awarded. Without this being included, a Proponent with six months experience could score 5/9 (almost the minimum) if the last four criteria were met.

If a minimum score applies to Proponent Experience, this should be stated in the row for Total Score.

If experience is not being evaluated, adapt the criteria for this section of the Evaluation Handbook to match what was requested. In this case, additional criteria can be added, assuming that they logically would have been addressed in a thorough response to the instructions.

7.5. Section 5: Approach

Approach is evaluated in just one section (noting that the heading in the Evaluation Handbook should match the heading in the SRFP). In the Evaluation Handbook template, each of the lines in the spreadsheet would be specific to what the SRFP identified as being important. For example, if one of the criteria was to propose a work plan with milestones and a proposed end date that did not exceed 22 weeks, the criteria in the handbook would include the following lines:

- A work plan was proposed with a completion date that does not exceed 22 weeks from Contract signing
- The work plan included logical milestones (If point is not given, explain why in the comments section)
- Each milestone included reasonable due dates (If point is not given, explain why in the comments section)

The Evaluation Handbook template includes three criteria that should be included in all SRFPs, since they are part of the SRFP Proposal Form boilerplate language. A Proponent would get bonus marks if they proposed an approach that convinced evaluators that efficiency or quality could be improved, or that in some other way was a benefit to the Province.

If a minimum score applies to Approach, this should be stated in the line for Total Score.

In all other respects, the Approach section should be evaluated in the same manner as the Experience section.

7.6. Section 6: Price or Budget

If price is being evaluated, it must be evaluated as stated in the SRFP documents. Section 3.13.2 of this Guide describes various options that can be considered. Match the Evaluation Handbook to what is stated in the SRFP, including the formula to be used, if applicable.

If budget is being evaluated, change the Evaluation Handbook to match what was requested in the SRFP Proposal Form. Additional criteria can be added, assuming that they logically would have been addressed in a thorough response to the instructions.

If neither price nor budget is being evaluated, delete this section from the Evaluation Handbook.

7.7. Total Score for Proponent

The Evaluation Handbook must sum all of the weighted scores allocated to each proposal. If using the Evaluation Handbook template, be sure that the formula inserted captures all weighted scores. Remember that the total points and each sub-sections' points must match exactly what was disclosed in the SRFP.

7.8. Evaluators' Sign-off

Evaluators should sign-off on their evaluation documentation. If the document is specific to one evaluator's individual notes, this is the only name and signature that is required. If it is the consensus document, all evaluators should sign.

8. ISSUING AND MANAGING THE SRFP

As described in section 1.4 of this Guide, SRFPs can be posted on BC Bid, or they can be directed to selected proponents. If posting on BC Bid, be sure that the following match exactly what was stated in the SRFP and SRFP Proposal Form:

- the Closing Date and Time indicated in BC Bid; and
- the Closing Location options; and
- the Government Contact.

Be sure to select "Short-form Request for Proposals" as the type of opportunity in BC Bid; this will ensure that Proponents are advised of the SRFP Rules that apply.

8.1. Addenda

Expect proponents to have questions about the SRFP, which should always be answered in addenda that are posted on BC Bid or distributed to invited proponents (see section 3.10 of this Guide for more information on Questions). 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, the SRFP Rules etc. Ministries are strongly advised to seek legal advice when answering questions related to changes or interpretation of the contract terms and conditions or the SRFP Rules.

Questions should be answered as addendum to the SRFP; an SRFP Addendum template is available [online](#) for this purpose. Addenda should be consecutively numbered, as well as each question that is asked. If multiple addenda are released, the numbering of questions should continue from one addendum to the next for ease of reference.

Questions should be as close to verbatim as possible in the addenda. However, if a proponent identifies themselves in their question, delete these references by using "..." in place of the words that were deleted. If the question is unclear as written, edit it for clarity using the three periods for words that are deleted and square brackets [] to indicate words that have been inserted.

Answers should be as specific and concise as possible, but not all questions need to be answered. For example, a proponent may ask what the budget is for the contract. The ministry can give the budget in the addendum, but is not obligated to do so. If the decision is to keep the budget from proponents, the answer to this question should briefly state why this information is not being released.

Addenda are not restricted to just answering proponent questions. They can also be used if an error is found in the SRFP or if something changed that affects what the Province will need in proposals. Addenda should be posted to correct any errors, and/or to provide additional information or direction to proponents.

Proponents are solely responsible for checking BC Bid for any addenda on opportunities that are posted there. The Province is not obligated to notify a proponent that their question has been answered, although an email can be sent once the addendum is posted. However, if one proponent is emailed that their question has now been answered on BC Bid, this same courtesy must be extended to all proponents to ensure the integrity of the process.

For those SRFPs that are not posted on BC Bid, addenda should be emailed or faxed to all proponents invited to participate.

Documents that are posted on BC Bid or distributed to selected proponents should never be replaced. For example, if an error was made in the pricing section of the SRFP, a new SRFP should not be posted or distributed that fixes the error. Instead, an addendum should be issued that states the pricing section of the original SRFP should be deleted and replaced with the following. If an error was made in the SRFP Proposal Form that cannot be easily fixed with an addendum alone, a new SRFP Proposal Form can be posted; in this case, be sure to rename the SRFP Proposal Form so that Proponents are clear that it is an updated form. An appendix should also be posted, directing proponents to use the new SRFP Proposal Form rather than the original one.

Addenda should not be posted in the last three or four days of posting, whether or not a cut-off for questions was specified in the SRFP. If a question is received this late in the process, evaluate its importance. If all proponents should have this information, extend the closing date and issue the answer as an addendum. If the answer is not of consequence, email or fax the proponent who asked the question to say that there is insufficient time left before closing and therefore the Province will not answer the question.

8.2. Vendor Relationships While SRFP is Open

Ministries may have contact with proponents while the SRFP is open, provided that the SRFP is not discussed. For example, a proponent may be the incumbent contractor, or a contractor for another project. Ministries can continue business as usual in these cases, but must not provide any information about the SRFP outside of the formal addenda process.

Ministries should also be aware of any perceptions of bias that may exist or be created while the SRFP is open. For example, proponents may feel that an incumbent contractor has an advantage in the process because they have knowledge of the project that is not generally known. Alternately, a current contractor may feel that bias against them exists because of unresolved issues with another contract. Be careful not to do anything that may create these perceptions. If in doubt, contact Procurement Services Branch or Legal Services Branch for advice.

9. CLOSING PROCEDURES

9.1. Before the Closing Date and Time

Proposals will be received right up until the Closing Date and Time. Hard copy submissions should be date and time stamped, and stored unopened in a secure location until after the Closing Date and Time. A list of all proponents who submitted a hard copy proposal should be kept as the proposals arrive, to ensure none are inadvertently missed during the evaluation process. Electronic submissions through BC Bid cannot be accessed until after the Closing Date and Time.

Evaluators should not receive or handle proposals prior to the Closing Date and Time, to ensure the integrity of the process.

Proponents can make any change they wish to their submitted proposals, up to the Closing Date and Time. Proposals are irrevocable after the Closing Date and Time. If a change is received prior to the Closing Date and Time, it should be stored with the original proposal and should be considered in the evaluation process.

The Evaluation Handbook must be finalized prior to beginning any evaluations. This usually means prior to the Closing Date and Time in order to avoid delays in beginning the evaluation process.

9.2. After the Closing Date and Time

Once the Closing Date and Time has passed, the evaluation process can begin (assuming that the Evaluation Handbook has been finalized). If the SRFP was posted on BC Bid and allowed eBids, be sure to check the website and download any proposals received. Compare all the proposals received to the list of hard copy submissions that was created as proposals were delivered, to be sure that all are included.

Once all of the proposals received have been collected, check each to ensure that the mandatory requirements have all been met.

If a proponent submits a proposal using more than one acceptable delivery method and the proposals arrive on time, send a clarification email to that proponent asking which of the proposals should be used for evaluation purposes. This ensures that proponents take responsibility for the choice rather than the Province. This step should be taken even if both proposals appear identical.

Distribute copies of all proposals that have met the mandatory requirements to the evaluators. This can be done electronically through email. Keep one copy of the hard copy submissions for the procurement file.

Once all proponents to the SRFP are known, a list of these organizations should be sent to all evaluators. Each evaluator should confirm that no conflict of interest exist with any of the proponents. If a conflict is found, that evaluator should not continue with the process, and may be replaced with someone else. Examples of conflicts include, but are not limited to, family relationships with principles /owners or employees of a proponent, friendships with proponent principles / owners, financial interests in a proponent organization, etc.

9.3. Issues with Mandatory Requirements

If a proposal has missed one or more mandatory requirements, use the Evaluation Handbook to document exactly what was missed. Do not forward any proposals that have missed a mandatory to the evaluation team.

If there is any doubt as to whether or not a proposal has met a mandatory requirement, consult with Legal Services Branch or Procurement Services Branch. Consider that sometimes substantial compliance may apply. For example, if a proponent submitted a hard copy proposal but not the electronic copy, this is generally substantial compliance as the Province can easily create the electronic file by scanning the hard copy, and this approach does not compromise or impact anyone else's proposal, nor does it allow for any changes in the proposal after the Closing Date and Time.

Late proposals – even those that are one minute late – should always be rejected as missing a mandatory requirement. The Province must not accept late proposals, as the Courts have found late proposals to be non-compliant (meaning that other proponents can successfully sue the Province if a late proposal is ultimately successful and awarded the contract).

Proponents must use the SRFP Proposal Form for their proposal. This means a pdf of the completed smart form. If any other format is used, the proposal cannot be considered or evaluated. .

If a proposal misses a mandatory requirement, a letter should be sent to the proponent explaining exactly what was missed and that the proposal was not evaluated. This letter can be sent immediately, or it can be sent after the evaluation process is complete. If the proposal arrives late, the proposal should be returned unopened with the letter; however, take a photocopy of the proposal envelope or cover sheet for the procurement file, indicating who sent the proposal and including the date and time stamp.

10. EVALUATING PROPOSALS

10.1. Individual Evaluations

Those proposals that met all mandatory requirements should be sent to the evaluation team. Team members will then read and evaluate each proposal on their own, using the finalized Evaluation Handbook for each proposal. Evaluators should not discuss the evaluation of proposals during their individual assessments, in order to avoid unduly influencing each other. However, someone who is not an evaluator should be designated for evaluators to bring forward any situations that they are not sure how to manage. The designated person should be knowledgeable on the SRFP and procurement generally, thereby able to provide advice to individual evaluators or the team overall, as required.

During individual evaluations, the evaluators should evaluate all proposals, even if they feel that the minimum score will not be met. This approach has two benefits:

1. The individual may be marking proposals more strictly than the rest of the team. If in consensus the proposal actually meets the minimum scores, this individual will require evaluation notes on the rest of the proposal to ensure the fairness of the process.
2. Even if the team collectively determines that the minimum score is not met, individual notes on the proposal can be used to provide informal feedback at a debrief (see section 13 for more information on debriefs).

10.2. Consensus Evaluations

When all evaluators have completed their individual evaluations, they should bring their completed Evaluation Handbooks to the consensus meeting. Using their notes, the team should discuss each section to be evaluated, and agree on the scores and comments to be captured. These consensus decisions should be documented as the decisions are made; it can be helpful to use a projector for this process, so that the entire team can see what's included in the consensus process.

Evaluators should not change their scores or comments on their individual notes during the consensus process. Individual notes should be retained in the solicitation file, to demonstrate the decision-making process.

If the team has trouble reaching consensus on a particular point, it is acceptable to average each evaluator's scores after discussion, in order to come to agreement on a final score. However, be sure that the comments support the score that is ultimately determined.

If a minimum score is not met in the consensus process, it is acceptable to end the consensus evaluation of that proposal as the proponent cannot be awarded the contract.

Once the consensus evaluation process is complete, a final version of the Evaluation Handbook should be printed for each proposal, and all evaluators should sign indicating their agreement with the final results.

10.3. What to Evaluate

Only the information contained in the proposals can be considered for the evaluation process. Similar to an interview process, evaluators cannot give points for something they know a proponent has or does but is not included in their proposal. Similarly, a proponent must be given credit for everything stated in their proposal even if the evaluators are not convinced that it is true (such issues can be resolved through reference checks if it's related to experience or through the contract finalization process if it relates to anything else). This process ensures that the evaluators are treating those proponents they know the same as those they do not know.

If the proposal named proposed sub-contractors, their experience should be evaluated the same as the proponent's experience, unless the SRFP stated that subcontractors were not permitted. However, if section 2 of the SRFP Proposal Form does not name any sub-contractors, but section 4 of the SRFP Proposal Form addresses sub-contractor experience, deduct points as the proponent has not been clear on whether or not sub-contractors will be involved. For example, evaluators may decide to give full credit for the proponent's own experience, but only half the points that would have been awarded to the sub-contractors had their role been clearer. Note that this is only one possible solution to address this kind of ambiguity; other options can be considered, if the evaluation team agrees on the approach to be taken and applies it consistently to all proposals where applicable.

Most proposals will quote pricing in Canadian dollars. However, if another currency is used, convert the currency quoted into Canadian dollars using the following methodology: Determine the exchange rate between the currency quoted and Canadian dollars from the Bank of Canada's website located at:

<http://www.bankofcanada.ca/rates/exchange/>, and convert the prices quoted to Canadian dollars using the noon exchange rates on the closing date of the SRFP.

10.4. Fairness When Evaluating Proposals

A critical component of this process is treating all proponents the same. This means that the same evaluators must evaluate the same information for each proposal competing for the contract. If during the individual evaluations, an evaluator cannot continue with the process, this person's individual notes should be destroyed and not considered in the process. This individual can be replaced with another evaluator at this point, noting that the team should consist of no fewer than three people who, overall, have the necessary knowledge and skills to fairly assess the proposals. If an evaluator must drop out during the consensus process, all consensus notes up to that point must be destroyed and the process must begin again. Note that this is true whether or not the evaluator dropping out is replaced; to do anything else will mean that the proposals competing against each other are being evaluated by different teams, which is considered unfair.

All evaluation documentation, including individual notes, is subject to the *Freedom of Information and Protection of Privacy Act*. For this reason, keep all comments professional and factual, with supporting facts for any opinions expressed.

10.5. References

The SRFP has been designed to include references specific to the experience being cited. The SRFP Rules state that Province may check references – this is a choice to make as part of the evaluation process.

References are pass / fail criteria. This means that the purpose of checking references is to confirm that the experience cited is acceptable to the Province. References should not be scored on their own or used to adjust scores in the SRFP process.

If references are to be checked, this should be the last step prior to announcing results to the successful proponent. As references do not impact scores, only the highest scoring proponent's references should be checked.

References can be contacted either via phone or email. All references should be asked the same questions, and answers should be documented. The same person should make all contact with all of the references.

If the references are acceptable, proceed with the notification process. If any references cause concern, contact the Legal Services Branch. Ministries should not disqualify a proponent from consideration based on references without prior consultation with Legal Services Branch.

11. NOTIFICATION OF RESULTS

Once the final consensus results are known, proposals will be ranked by score. Award the contract to the highest scoring proponent that has met all mandatory requirements and minimum scores. However, individual ministries may have internal approval / notification processes to complete first before the results of the SRFP are made public.

11.1. Successful Proponent

The successful proponent should always be notified of the SRFP results first. This notification can be emailed to the contact person for the proposal. Sample letters can be found at the [Procurement Community of Practice SharePoint site](#). Once this notification has been sent in writing, the ministry can contact the successful proponent to schedule a meeting(s) to finalize the contract.

11.2. Unsuccessful Proponents

Once the successful proponent is notified of the results, all other proponents can be contacted. If the contract finalization is expected to take less than two weeks, unsuccessful proponents should be notified after the contract is signed. This helps to ensure that the second highest scoring proponent is still available in the event that a contract cannot be finalized with the highest scoring proponent.

If finalizing the contract is likely to take two weeks or more, or the ministry is concerned that these proponents will hear informally “through the grapevine” about the SRFP results, unsuccessful proponents can be notified of results right after the successful proponent is advised. In this case, proponents who have met the mandatory requirements and minimum scores should be reminded that their proposals are valid for 90 days, just in case the ministry needs to initiate contract discussions with the next ranked proponent.

Unsuccessful proponents should always be offered a debrief meeting; see section 13 of this Guide for more information.

Sample notification letters for unsuccessful proponents can also be found at the [Procurement Community of Practice SharePoint site](#), for both after and before the contract is signed.

11.3. Posting Results on BC Bid

If the SRFP was posted on BC Bid, the results – including the contractor’s name and the overall dollar value of the contract – must be posted on BC Bid as well. Contact the Procurement Services Branch if assistance is needed with this process.

12. CONTRACT FINALIZATION

Once the successful proponent has been notified of the SRFP results, schedule a meeting to finalize the contract. In preparation for this meeting, create a first draft of the contract. This should consist of the contract format that was identified in the SRFP document, with all schedules addressed, as noted below. Send an advance copy of the first draft of the contract to the successful proponent, so that they can review and identify any areas that they wish to discuss.

Remember that the final contract can have no material changes from the SRFP and the successful proponent’s completed SRFP Proposal Form. Contact the Legal Services Branch if in doubt that a contemplated change is minor adjustment / clarification, or a material change.

Once the final version of the contract is agreed upon by both parties, the contractor will sign first followed by the Province. Faxed copies of executed contracts are acceptable, and if the parties agree, a scanned pdf of the executed contract may be delivered by email attachment.

Do not allow the successful proponent to begin work prior to having the contract signed by both the contractor and the Province.

The schedules addressed below are based on the General Service Agreement; if a custom contract applies to the SRFP, these schedule names may or may not be the same.

12.1. Schedule A Services

Schedule A Services should be completed by inserting the information from the Scope section of the SRFP and from the proposed Approach in the successful proponent's SRFP Proposal Form. Change the language to contract language, meaning that the deliverables are expressed as "The Contractor will".

Make notes and/or highlighted additions in Schedule A where additional detail or clarity is needed. These will be points of discussion with the successful proponent, noting that they may have notes and/or additions of their own, and may or may not be agreeable to the Province's suggestions.

12.2. Schedule B Fees and Expenses

Complete Schedule B in accordance to the price that was proposed. If the SRFP indicated how payments would be made (e.g. monthly, upon meeting milestone deliverables, hourly rate, etc.), build this into this schedule. If the SRFP was silent, insert what appears reasonable for payments but be prepared to discuss the suggested approach with the successful proponent.

Price is almost always considered material, and therefore no changes should be contemplated to the price proposed by the successful proponent.

12.3. Schedule C Subcontractors

If the successful proposal indicated that subcontractors would be used in service delivery, insert those names and contact information into Schedule C. If no subcontractors were identified, indicate "not applicable".

12.4. Schedule D Insurance

Schedule D should match exactly what was indicated in the SRFP under the Contract Format.

12.5. Schedule E Privacy Protection and Schedule G Security

If using the GSA and the SRFP stated that either or both of these schedules were included, include them verbatim in the contract. If the SRFP stated that one or both of them did not apply, delete the words under the appropriate heading and write "not applicable".

12.6. Schedule F Additional Terms

If using the GSA and the SRFP stated that Schedule F does not apply, write "not applicable" under this heading. If it does apply, the SRFP would have included an Appendix B identifying what these additional terms are, which should be copied verbatim into the contract.

13. DEBRIEFS

All unsuccessful proponents must be offered a debrief (refer to section [6.3.3 item \(c\) 1](#) of the Core Policy and Procedures Manual). Debriefs are private meetings between the Province and individual proponents, where the strengths and weaknesses in the proposal can be disclosed; it is not an opportunity to debate scores or change results.

When notifying the unsuccessful proponents of the SRFP results, offer the debrief and give a time limit (at least one week) for the proponent to request this meeting.

13.1. Scheduling Debriefs

Once the time limit has passed, schedule all debrief meetings. Debriefs can be scheduled as either in-person meetings (at a location convenient to the ministry) or via telephone – whichever the proponent prefers. When scheduling debriefs, pick a day at least two weeks in advance to allow for the proponents to arrange their schedules. Plan at least 45 minutes between in-person meetings and 30 minutes between telephone meetings; this may result in gaps between meetings if scheduling them consecutively as debriefs can be as short as 10 minutes, but these gaps are preferable to cutting a meeting short or delaying the next one.

13.2. Summary of Evaluations

Proponents appreciate being given documentation specific to the evaluation of their proposal. Ministries can create summary evaluation documents from the consensus document that includes only the scores awarded and comments for all those sections where the proposal scored lower. This summary should be given to the proponent during the debrief, either in hard copy for in-person meetings or electronically for telephone meetings.

It is not advisable to only provide written documentation without or in advance of a meeting. Proponents can easily misinterpret what is written, and may react prior to seeking clarification on what was meant. Presenting the information in a meeting gives the proponent the immediate ability to ask questions, and the ministry to explain how or why the scoring decisions were made.

13.3. Release of Information

Proponents can be told virtually anything about the evaluation of their own proposal. In addition, they can be told the overall score (but no breakdowns) and the overall price (but no unit pricing) of the successful proposal. Refer to the document titled [Release of Information and/or Documents Related to Competitive Procurement Opportunities](#) for more information on what information can be publicly released.

Anticipate what each proponent is likely to want to know about how their proposal was evaluated, and come prepared to answer those questions. Because Proponents can easily discover the difference between their scores and the successful proponent's score, proponents may have more detailed questions if the successful proponents' and their scores are very close. The unsuccessful proponent may want an explanation for every score that was not perfect in order to fully understand what was needed to score high enough to be offered the contract.

13.4. Debriefing Successful Proponents

Sometimes, a successful Proponent will request a debrief meeting to better understand the process and to help ensure their success in future opportunities. If time permits, schedule this meeting with the other debriefs. Alternately, this information can be provided to the successful proponent during the contract finalization process.

14. DOCUMENTATION

All SRFPs require complete files that reflect how and what decisions were made as well as correspondence with government staff and vendors. Following are guidelines on what information should be kept, in hard copy and/or electronic files. All this information is subject to the *Freedom of Information and Protection of Privacy Act* (i.e. a ministry may be required to produce all or some of the documents related to SRFPs), audits, and record retention policies.

The documents that should be retained do not need to be in one location. However, if keeping files in different locations, be sure that every location references where the other documents can be found. In the case of an audit or Freedom of Information request, ministries may be required to produce all documents related to a specific contract.

14.1. Planning Documents

Ministries should retain any documentation that was used to plan the contract that ultimately results from the SRFP. This may include Briefing Notes, Business Cases, Cost/Benefit Analysis, Needs Assessments, Feasibility Studies, etc.

14.2. SRFP Solicitation Documents

Anything that is posted on BC Bid or that is sent to selected proponents is a public document. The SRFP file should contain all final documents that were made available to proponents. This includes a copy of the SRFP Rules that were in affect at the time, as they will be updated from time to time.

In addition, the drafts of these documents should be retained, as they show how the decisions were made that ultimately resulted in the released documents. Ministries should have a version control process in place, to easily identify the order of draft documents and the individuals who made edits and/or decisions.

14.3. Documenting Evaluations

The SRFP file should include the final consensus evaluation document for each proposal, signed off by the evaluators. This includes any documentation related to proposals that missed mandatory requirements. The individual notes made by the evaluators are needed for the file as they document the decision process.

Ministries may find it convenient to develop a summary of all final consensus scores, for reference purposes.

14.4. Contract Files

The ministry staff managing the resulting contract from the SRFP will keep a copy of signed contract on file. This contract should reference the SRFP and the Contractor's proposal, copies of which should be kept with the contract.

Any documentation and correspondence related to the management of the contract and service delivery should be kept with the contract file. This includes the evaluation reports of the contractor and ministry at the end of the contract term.

Documentation is required for the invoices and payments made on the contract, which is usually kept with an Accounts Payable department.

15. FORMAL VENDOR COMPLAINTS

Sometimes, proponents will launch a formal vendor complaint because they feel that the process was unfair and biased against them. Information on how to respond to a formal complaint can be found at <http://www.fin.gov.bc.ca/ocg/pgo/VCRP.htm>.

If a formal complaint is received, encourage the proponent to schedule a debrief if this has not yet occurred. Extend the deadline for starting a formal complaint, if required, to accommodate the debrief meeting.

Do not insist on a vendor submitting their complaint in a specific format; if they state that this is a formal vendor complaint, treat it as such regardless of how the complaint was submitted.

A written response to a formal vendor complaint is required within a set number of days. This response should be from a senior manager (e.g. the Assistant Deputy Minister) from within the ministry, with input from those who were involved with project. Ministries may also want to engage the Procurement Services Branch and/or Legal Services Branch, depending on the nature of the complaint.

If the vendor is not satisfied with the response provided by the ministry, they do have the option of escalating their complaint to the Office of the Comptroller General in the Ministry of Finance for a second review.

If a formal vendor complaint is received on a SRFP, do not halt the process to award the contract with the successful proponent. Contracting activities should continue as planned. The formal vendor complaint process is not an appeal, but rather an opportunity for vendor concerns to be heard and addressed, as appropriate.

APPENDIX 1: Glossary

- a) **“BC Bid”** means the website located at <http://www.bcbid.gov.bc.ca/open.dll/welcome> where the Province and other public sector entities post their opportunities to purchase goods, services and construction from interested vendors;
- b) **“BC Bid Help Desk”** means the support that is available to government and staff and vendors for BC Bid available through email at procurement@gov.bc.ca or phone at 250-387-7301 during normal business hours (i.e. 8:30 a.m. to 4:30 p.m. local time Monday to Friday, exclusive of BC statutory holidays);
- c) **“Closing Date and Time”** means the date and the time that is identified in the SRFP up until which proposals will be accepted;
- d) **“Core Policy and Procedures Manual”** or **“CPPM”** means the ministry corporate manual that can be found at <http://www.fin.gov.bc.ca/ocg/fmb/manuals/CPM/CPMtoc.htm>;
- e) **“Corporate Supply Arrangements”** or **“CSA”** means the standing offers that ministries must use to purchase goods and services that are available, as described at <http://www.pss.gov.bc.ca/csa/csa.html>;
- f) **“eBid”** means the functionality within BC Bid for registered proponents to submit their proposals electronically through the BC Bid website;
- g) **“Evaluation Handbook”** means the document that is developed for a specific SRFP to record the evaluation of proposals received;
- h) **“General Service Agreement”** or **“GSA”** means the corporate contract templates and associated schedules that can be found at http://www.pss.gov.bc.ca/psb/gsa/gsa_index.html;
- i) **“Government Contact”** means the individual identified as being the main contact for questions on the SRFP;
- j) **“Guide”** means this Ministry Writers’ Guide: Developing & Managing Short-form Requests for Proposals (SRFPP);
- k) **“Legal Services Branch”** means the Legal Services Branch of the Ministry of Justice (more information can be found at <http://gww.legalservices.gov.bc.ca/index.aspx>);
- l) **“List of Qualified Suppliers”** or **“List”** means a list of vendors that have been prequalified through a Request for Qualifications process to provide specific goods and/or services to the branch, division, ministry, or corporately, as described in the RFQ document;
- m) **“Posting Period”** the time from which a SRFP is posted on BC Bid or otherwise issued to proponents up until the Closing Date and Time specified in the SRFP;
- n) **“Procurement Services Branch”** means the Procurement Services Branch of the Logistics and Business Services Division of the Ministry of Technology, Innovation and Citizens’ Services (more information can be found at <http://www.pss.gov.bc.ca/psb/>);
- o) **“Province”** means Her Majesty the Queen in Right of the Province of British Columbia, and includes all ministries;
- p) **“Qualified Supplier”** means a vendor who has prequalified through a RFQ process and is included on the resulting List;
- q) **“Request for Proposals”** or **“RFP”** means the conventional documents and process (usually associated with the standard provincial templates found at <http://www.pss.gov.bc.ca/psb/procurement/procurement->

[templates.html](#)) used to evaluate and rank proposals in order to select a contractor to provide specified goods, services and/or construction;

- r) **“Request for Qualifications”** or **“RFQ”** means the process and documents that are posted on BC Bid to qualify experienced vendors for future opportunities to supply the Province with the goods and/or services described in the RFQ;
- s) **“Risk Management Branch”** means the Risk Management Branch of the Ministry of Finance (more information can be found at <http://www.fin.gov.bc.ca/PT/rmb/index.shtml>);
- t) **“Short-form Request for Proposals”** or **“SRFP”** means the two-page request for proposals process described in this Guide, and includes the SRFP document describing what is being purchased(which must not exceed two pages) and the SRFP Proposal Form (more information can be found at www.gov.bc.ca/srfp);
- u) **“SRFP Proponents’ Guide”** means the guide that has been developed to assist proponents with the development of their proposals, and which can be found [online](#).
- v) **“SRFP Proposal Form”** is the document that describes what the ministry will evaluate in proposals, and that proponents must use to fill in their responses to the SRFP requirements to be considered in the SRFP process;
- w) **“SRFP Rules”** are the administrative mandatory requirements and the terms and conditions that apply to the SRFP process, as found at <http://www2.gov.bc.ca/gov/topic.page?id=57561D95EB294D7E842F890F69F023AE> and updated from time to time;

APPENDIX 2: Scope Analysis

Use this Appendix to assist in determining whether or not the contract should be considered in scope:

IN-SCOPE	<input checked="" type="checkbox"/>	OUT OF SCOPE (Meeting even one of these criteria means that the contract is out of scope)	<input checked="" type="checkbox"/>
The overall contract value is expected to be under \$250,000.		The overall contract value is expected to be \$250,000 or more.	
No Corporate Supply Arrangement exists that would meet the ministry's need. See the Core Policy and Procedures Manual section 6.3.2 a 1 for more information.		The goods / services can be obtained through a Corporate Supply Arrangement.	
A rationale for direct award, as allowed in policy, does not apply. See the Core Policy and Procedures Manual, section 6.3.3. a 1 for more information.		A direct award is permitted as per provincial policy.	
The opportunity will result in a Ministry contract where the contract format is known. The contract format can be one of the General Service Agreements or another contract format that has been approved by the Legal Services Branch.		The contract format, or parts of the contract terms and conditions, is not known prior to selecting the highest scoring proponent. If the full contract has elements that will be negotiated, the SRFP is not the appropriate format to use.	
More than price is evaluated. The intent is to award the contract to the highest scoring proponent, which may or may not be the lowest price. .		Price is the only differentiating factor (i.e. the award will be made to the lowest price that meets specifications). Use the Invitation to Quote (ITQ) for Services instead of the SRFP.	
The purchase is specific to goods, and additional value is being sought that warrants spending more than the lowest price proposed for goods that meet the specifications.		The purchase is specific to goods, and no additional value will be obtained by spending more for a product tha meets specifications.	
The contract scores 3 or less in the exposure matrix below		The contract scores 4 or more in the exposure matrix below	

If the contract is out of scope, explain why in the box below:

EXPOSURE MATRIX

Score 1 point for each criterion determined to be “higher exposure”, and 0 points for each considered to be “lower exposure”.

Lower Exposure Contracts	Higher Exposure Contracts	SCORE
The Province has contracted for substantively the same services in the past.	This is a new service, or substantive changes were made to how services have been delivered.	
The scope is well known and can be defined.	The scope is vague, as a number of solutions could address the need/problem, or future undefined phase(s) apply.	
Industry or provincial standards and/or performance measures exist and can be referenced.	No standards or performance measures currently exist.	
The Province’s requirements can be described within the two-page limit of the SRFP (noting that URLs and/or appendices are acceptable).	The requirements are complex, and are difficult to adequately described in the two-page limit.	
Face to face contact is not needed. Answers to Proponent questions can be managed through written addenda, and no Proponents’ Meeting or shortlist process (e.g. interviews, presentations, user testing, etc.) are required.	A Proponents’ Meeting is required OR a shortlist process (e.g. interviews, presentations, user testing, etc.) is essential to differentiate proposals.	
Proponent experience can be evaluated by addressing only ONE of the following: organizational experience; one individual’s experience; or the experience of a collective team of key personnel.	To ensure a fully qualified contractor, evaluation of the organization’s and one or more individuals’ experience is required.	
What is to be included in price and how price will be evaluated can be clearly described.	Price is complex, requiring considerable definitions for what should be included, and/or how price will be evaluated is complex.	
TOTAL SCORE		