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

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Shared Services BC
Procurement
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1 INTRODUCTION

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

What will I find in this guide?

This guide:

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

Does this guide apply to the Joint Solution Procurement process?

No. The Joint Solution Procurement (JSP) process has been developed by Procurement and Supply Services (PSS) for complex opportunities where a traditional RFP process may not be sufficient. The JSP process has been successfully applied to complex alternative service delivery initiatives and information technology procurements that require a more collaborative process than can be achieved with an RFP process. PSS manages all JSP processes and provides the necessary guidance throughout this type of procurement process.

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

No. This guide applies only to RFPs issued by ministries in the Government of British Columbia. It reflects the expectations of government procurement policy as defined in Chapter 6 of the Core Policy and Procedures Manual.
Other public sector organizations may choose to use this guide, and
government’s standard RFP and contract forms, particularly if they have
adopted government’s procurement policy.

| Why are there so many 
| rules around 
| government’s 
| procurement and 
<table>
<thead>
<tr>
<th>contracting processes?</th>
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| The rules governing procurement and contracting practices in the 
| Government of British Columbia are in place to ensure government 
| obtains good value for the tax dollars spent, through a process that is fair 
| and open. These rules balance the objective of getting good value for 
| money with a process that is fair to both ministries and vendors. 
| Government procurement policy also reflects the expectations for fair and 
| open procurement processes that are embodied in the *Procurement 
| Services Act* and the *Agreement on Internal Trade*, as discussed in the 
| *Purchasing Handbook*. |

| Which government 
| offices have a role in 
<table>
<thead>
<tr>
<th>the RFP process?</th>
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| Responsibility for the RFP process is decentralized in government, with 
| each ministry having the authority to solicit proposals and enter into 
| contracts for services in support of its own programs. PSS staff and 
| ministry specialists are available to support program areas with 
| procurement and contracting processes. The RFP process is further 
| supported by core policy (overseen by the *Procurement Governance 
| Office*) and training offered by the *Procurement and Contract 
| Management Program*, PSS makes information, such as this guide, 
| available to help ministries manage an RFP process that meets the 
| expectations of core policy. In addition, PSS can assist with any and all 
| aspects of an RFP process on a fee for service basis. |

| What is fair to 
<table>
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<tr>
<th>vendors?</th>
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| Preparing a proposal may be expensive for a vendor, so it is important to 
| ensure that the cost of preparing a submission is not excessive in relation 
| to the business opportunity. If vendors view the process as too costly in 
| relation to the potential contract value, the RFP may not result in 
| identifying a qualified supplier. In addition, vendors interested in 
| submitting a proposal need to know that they all have an equal 
| opportunity to be awarded a contract. Section 2.4 of the *Purchasing 
| Handbook* provides additional guidance on how to ensure fair treatment 
| of vendors in government procurement processes. |

| When would 
| Procurement and 
| Supply Services issue 
| an RFP on behalf of a 
<table>
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<th>ministry?</th>
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| Government policy requires that all RFPs for Information Technology 
| purchases valued at $500,000 or more, and any RFPs for goods, be 
| competed through PSS. In addition, at the request of ministries, PSS can 
| assist with any and all aspects of an RFP for service opportunities and 
| must review all RFPs for Information Technology purchases valued at 
| between $100,000 and $500,000. Consequently, an RFP may be issued 
| directly by a ministry with PSS as the contact location, it may be issued by |
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PSS on behalf of a ministry, or it may be completely managed by a ministry.

PSS and ministry specialists can provide assistance and answer any questions regarding government procurement processes, including the RFP process. Within PSS there are two branches with experienced staff available to help ministries develop RFP documents and manage the RFP process: Procurement and Supply Services (PSB) and Strategic Acquisitions and Technology Procurement (SATP) Branch. In addition, the IT Procurement Branch is available to support IT procurements.

Although the various branches within PSS focus on different types of procurement, staff in any branch will provide assistance. Queries received will be internally directed to the person who can provide the best assistance in any given circumstance. Section 14—Contacts provides contact information for PSS.

Questions regarding interpretations of government procurement policy or requests for advice on how to respond to vendor complaints should be directed to the Procurement Governance Office.
2 THE REQUEST FOR PROPOSALS PROCESS

What is the Request for Proposals process?
A Request for Proposals (RFP) process involves government presenting an overview of its perceived or expected requirements and asking for proposed solutions from interested vendors. The term RFP refers to both the RFP solicitation method and the RFP document, which is the tool for soliciting proposals. Proposals submitted in response to an RFP are evaluated using multiple criteria, such as price, qualifications and experience, and the proposed solution or approach.

When should an RFP be used?
Government uses the RFP solicitation method to compete contract opportunities when a ministry wants to review and implement different and new solutions to a problem, project, or business process. For example, an RFP may be issued when:

- a ministry has a situation for which it is not sure of the best solution;
- a ministry wishes to consider factors other than price in selection of a contractor;
- a ministry would like to see what the experts suggest;
- the requirement is complex;
- a program is new and the ministry would like ideas on how to deliver it; or
- a ministry would like to see if there are alternatives to the way it usually acquires a product or service.

What does the RFP process involve?
An RFP can range from a single-step process for straightforward procurement opportunities to a multi-stage process for complex and significant opportunities. For certain low dollar requirements, a simple RFP can be issued, calling for short, simple responses. As requirements increase in complexity and cost, the RFP becomes more complex and asks proponents to provide more detail in their responses.

A multi-stage process may involve the use of an information gathering phase and/or a pre-qualification process before the RFP is issued. Government commonly uses a Request for Information (RFI) or a Request for Expressions of Interest (RFEI) to gather information on the availability of desired services, the availability of potential suppliers, or the level of interest from the vendor community before going to the marketplace with an RFP.

Government uses the Request for Qualifications (RFQ) process to pre-qualify vendors. If an RFQ is used as the first stage in a multi-stage solicitation process, only those vendors who successfully respond to the
RFQ and meet the qualification criteria will be included in the subsequent RFP process. An RFQ may also be used to pre-qualify vendors who are interested in supplying goods and services in the future—if, as, and when requested. A pre-qualified supplier list, which may be ranked, will normally be produced as a result of this process for use in selecting contractors for future opportunities.

The Purchasing Handbook further explains how and when to use an RFI, an RFEI, and an RFQ.

An Invitation to Quote (ITQ) and an RFP are both solicitation documents. An ITQ and an RFP differ in what is being competed: ITQs look for the best price and RFPs look for the best solution.

An ITQ is used when the only competing factor is price. The vendor community is asked to submit quotes on an opportunity and the lowest qualified quote is awarded the contract. ITQs are most often used to acquire goods, but there are occasions where an ITQ may be used to acquire non-complex services where price is the only evaluation criterion.

With an RFP, proposals are evaluated against multiple criteria such as price, qualifications and experience, and the proposed solution or approach. The best proposal will be awarded the contract and the best proposal may, or may not, have the lowest price. The terms proposal and proponent are used specifically with the RFP process. An RFP is most often used to acquire services, although there are occasions where Procurement and Supply Services (PSS) may use an RFP to acquire goods.

When proposals are invited by government, the term proponent is used to describe an individual, company, or society that submits, or intends to submit, a proposal. In government, the terms vendor and supplier are often used interchangeably with the term proponent. For the purposes of this guide:

- a vendor is any party (individual, business, or society) that is in the position of being able to sell goods or services to government;
- a supplier is a vendor who has been selected through a procurement process to supply government with goods or services; and
- a proponent is a vendor who submits a proposal in response to an RFP document.

Each RFP will be unique. However, there are some common steps and decision points that are followed when moving from an identified need to the delivery of the required goods or services. These steps are as follows:
1. The ministry identifies a need.
2. The ministry may consult PSS to assist with identifying and assessing procurement options.
3. An RFI may be issued to gather background information, such as the availability of a service, to be used in developing the RFP document.
4. An RFEI may be issued to obtain information on the level of interest in the planned service opportunity.
5. An RFQ may be used to pre-qualify suppliers for a specific or a future procurement opportunity.
6. Once the requirement is fully defined, the RFP document is drafted and evaluation criteria are determined.
7. The ministry issues the RFP document.
8. A Proponents’ Meeting is often held. This information session is open to all potential proponents and other interested parties.
9. The ministry receives the proposals, which are evaluated by the evaluation committee.
10. The ministry selects and notifies the successful proponent and then notifies the unsuccessful proponents.
11. A contract is negotiated and signed with the successful proponent.
12. Individual debriefing sessions may be held with unsuccessful proponents.
13. The service is performed or the goods are delivered.

What information should be included in an RFP?

An RFP document is used to describe the program or requirement for which the ministry would like proposals and it establishes the criteria that will be applied to the submission and evaluation of proposals. The complexity and level of detail in an RFP document needs to reflect the value and/or complexity of the contract opportunity. The level of detail included in an RFP document should reflect the complexity, significance, and risk of the procurement opportunity.

Some standard information relevant to the requirement that should be provided to potential proponents includes the following:

- information about the role of the ministry and the background of the project or requirement;
- location of the ministry or client site(s);
- scope of the project and any restrictions on the scope of the work;
- key deliverables or outcomes;
- benchmarks outlining the ministry’s expectations, such as a proponent’s experience and qualifications;
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- risk and critical success factors;
- performance standards;
- governing legislation;
- reporting requirements; and
- any information that some potential proponents may have already had access to that others have not.

An RFP document will also define the terms and conditions of the RFP process, including the mandatory and desirable criteria that will be used to evaluate the submissions received.

Government policy requires that all contract opportunities for services valued at $100,000 or more and all contract opportunities for goods valued at $25,000 or more be posted on BC Bid. Ministries are encouraged to use BC Bid for contract opportunities valued at less than these thresholds as the vendor community is familiar with this system and because it is a cost-effective method for advertising government contract opportunities.

Information on how to use BC Bid is available on the BC Bid website and from PSS. Interested vendors can subscribe to BC Bid and be automatically notified of any new opportunities or any amendments to current opportunities that are posted on BC Bid and which match the vendor’s defined profile.

Ministry responses to vendor complaints should follow the review process and the time frames that have been established by each ministry, as required by government policy.

A vendor complaint should initially be addressed to the contact person for the RFP process in question. If the issue cannot be resolved informally (such as through a debriefing meeting), the complaint should be escalated within the ministry, as defined in the ministry’s Vendor Complaint Review Process. If the issue remains unresolved, the vendor can escalate it to the Procurement Governance Office.

Government’s Vendor Complaint Review Process is overseen by the Procurement Governance Office and is limited to issues of procurement policy and procedures. It is not available for issues related to vendor or ministry contract performance or conduct during a contract. These issues are dealt with through dispute resolution processes identified in individual contracts.

The ability to respond, and the nature of the response, to vendor complaints will depend on whether or not the vendor is a proponent, the

When should BC Bid be used to advertise or post an RFP?

What should I do if a vendor complains about the RFP process?
timing of the complaint (i.e., whether the RFP has closed or has been awarded), and the nature of the complaint.
3 PREPARING THE REQUEST FOR PROPOSALS DOCUMENT

Is there a standard Request for Proposals template?
A Request for Proposals (RFP) Template is available through the Corporate Procurement Solutions website (http://pss.gov.bc.ca/psb/home.html). Use of this template is mandated by government policy (Policy 6.3.2.a.5), as it reflects the requirements of government policy and common law as it applies to an RFP.

The RFP template has been designed for use with the General Service Agreement, or with ministry-specific contracts, for all types of services. The terms and conditions included in the RFP template and the General Service Agreement have been developed in consultation with Legal Services Branch to ensure potential proponents have all of the information they need to understand the RFP process and to ensure the interests of the Province are protected.

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

The standard RFP template has been designed to ensure that key information is communicated to any potential proponent and that all proponents have access to the same information. Government policy (Policy 6.3.2.a.7) requires that all proponents be provided with identical information.

The RFP template requires inclusion of:

- contact information;
- the rules of the RFP process, both administrative and legal;
- the ministry’s specific requirements and any relevant background information;
- any planned Proponents’ Meeting(s); and
- specific directions for the content and format of proposals.

Can I create my own RFP format?
No. Government policy requires ministries to use the standard RFP template that has been approved by Legal Services Branch.

If a proponent challenges the legality of an RFP process, government must rely on the terms and conditions built into the RFP template as part of its response to the proponent. Therefore, changing the wording in the
An RFP does not need to be complex. The template provides standard directions and wording, to which a ministry can add additional straightforward requirements, before requesting proposals from a minimum of three vendors. Alternatively, if a particular requirement is valued at less than $25,000, and the ministry requires a specialized service or is facing time constraints, a direct award may be an appropriate option. (Remember, the rationale for any direct awards must be documented.) The key is to ensure the cost of the process—both to government and to interested vendors—is reasonable given the potential value and complexity of the contract.

With appropriate planning, the RFP can be tailored to meet any ministry requirements. This includes complex, multi-phased projects and projects that involve delivery of more than one service in more than one location. Ministries are advised to contact PSS for assistance in preparing RFPs for complex projects.

An RFP process is undertaken to seek a solution to a problem where price will not be the only consideration. An RFP document is used to invite proposals from which a successful proponent will be selected. A binding contract is created between the Province and every proponent who submits a proposal that meets all of the mandatory criteria. The only exception is where a proposal is noncompliant (i.e., does not meet all of the mandatory criteria) or is withdrawn prior to closing.

Legally, a compliant proposal is an acceptance of government’s offer (solicitation) to enter into a bid contract (Contract A) and it is also an offer by the proponent to enter into a performance contract (Contract B), should their submission be the successful proposal.

The existence of a Contract A means that the proponents have accepted the terms contained within the RFP and the rules cannot be changed without advising all potential proponents. Once the RFP has closed, nothing can be added, deleted, or changed by either party unless a change is provided for in the RFP document. If a change of any kind occurs after this time, it could be considered a breach of Contract A.
Advice regarding the release of procurement records under the Freedom of Information and Protection of Privacy Act is available from ministry procurement specialists, who will consult with ministry Directors and Managers of Freedom of Information and Privacy as necessary.

The Corporate Information Management Branch is available for advice on government policy for maintaining and retaining records related to your procurement process.

Where can I get advice regarding the release, maintenance, and retention of records that are generated in the RFP process?
4 USING THE REQUEST FOR PROPOSALS TEMPLATE

The electronic Request for Proposals Template has been colour-coded to help ministries develop a Request for Proposals (RFP) document that is tailored to their requirements while retaining the language necessary to protect the Province. The template may look long and complex at first glance but it is very straightforward. The colour coding works as follows:

- **Yellow** identifies areas that are to be completed by ministries (the author);
- **Blue** identifies areas where choices must be selected (and the other options deleted); and
- **Red** identifies instructions that are to be deleted once that section of the RFP is complete.

An RFP document usually includes the following sections:

- a cover page that identifies a ministry contact person; the closing date, time, and location; and any scheduled Proponents’ Meeting(s);
- definitions of terms used in the document and an overview of administrative requirements;
- a brief description of the program or project for which vendors are being asked to submit a proposal (i.e., a summary of the requirement);
- a short description of the existing situation in the ministry or program area issuing the RFP and information on how the completed project will impact the functioning of the ministry;
- the scope of and requirements for the project that is the subject of the RFP;
- mandatory evaluation criteria;
- desirable evaluation criteria;
- information on the expected proposal format, such as the structure and length of the document;
- an overview of the expected content for each proposal; and
- a copy of the terms and conditions that will be included in the contract with the successful proponent.
4.1 Cover Page

The cover page contains two major sections. The top section provides proponents with information and instructions pertinent to the RFP, including:

- project title;
- ministry;
- RFP number;
- issue date;
- closing date and time;
- contact person’s name, address, fax number, and/or e-mail address;
- instructions for receipt of proposals (e.g., hard copy or electronic format; number of copies required); and
- date and location of the Proponents’ Meeting (if required).

The bottom section of the cover page is the Proponent Section. The Proponent Section must be completed and signed by the proponent (a mandatory requirement) and the signed cover page must be included with the proposal.

4.2 Definitions

Section A of the RFP template defines a number of terms that are used throughout the document, including: PSS, must, mandatory, should, desirable, proponent, and Province. The terms contract, contractor, and ministry are also defined to explain exactly which contract, contractor, or ministry is being referred to.

Throughout the RFP document, consistent use of the term proponent is encouraged. Ministries should avoid using any other term, such as bidder, tenderer, company, vendor, supplier, or offeror. By the same token, the document should always be referred to as the RFP and the proponent responses should be called proposals. The responses are not quotes or tenders, and they should not be referred to as such.
4.3 Administrative Requirements

The administrative requirements listed in Section A of the RFP template are the terms and conditions (the *rules*) of the RFP process. Submission of a proposal in response to an RFP indicates the proponent’s acceptance of all of the terms and conditions contained in the RFP document. Some of the key terms and conditions provided in the template, which should not be modified, include the following:

- Late proposals will not be accepted and will be returned to the proponent.
- Proposals will not be evaluated if the Province considers the proponent to be in a conflict of interest in connection with the project described in the RFP.
- The Province may terminate contract negotiations with the successful proponent if a written contract has not been reached within thirty days after the proponent was notified.
- Proponents may amend or withdraw a proposal prior to the closing date and time.
- All proposals become irrevocable upon closing time and may not be changed.
- Proponents are solely responsible for their own expenses in preparing a proposal.
- Proposals will be open for acceptance for at least ninety days after the closing date.
- Joint submissions and the use of sub-contractors are acceptable as long as one party to the proposal takes overall responsibility for the successful performance of the contract.
- The Province has the right to modify the terms of an RFP at any time, including the right to cancel an RFP at any time prior to entering into a contract with the successful proponent.

These terms and conditions have been developed with advice from Legal Services Branch and they should not be modified. If any changes to the administrative requirements are contemplated, Legal Services Branch must be contacted for direction.
4.4 Ministry/Project Requirements

How detailed should the Summary of Requirements be?
This section should provide a brief description of the project or program requirement. The descriptions should be sufficient for proponents to develop enough of an understanding of the requirement that they can form an opinion as to whether they are interested enough to read the whole document.

Any mandatory requirements, such as qualifications, location, or maximum price, should also be included in this section.

What are Additional Definitions?
Ministries may want to include additional definitions to help interested proponents understand the project-specific terminology that may be used throughout an RFP document. For example, if the RFP refers to a requirement for CWB certification, the RFP should define CWB as the Canadian Welding Bureau and the RFP should define the requirements for being CWB certified. These definitions, which are in addition to the RFP Definitions set out in Section A of the template, are added here.

What should I include in the Ministry Situation/Overview section?
To provide proponents with the context for a specific requirement, it is useful to describe what the ministry program or branch is currently responsible for and how the project will affect the program’s business or function. Under the Background heading, ministries can provide a brief history of the events that led up to the decision to issue an RFP.

What should I include in the Project Scope and Budget section?
A description of the project scope should define the breadth and depth of the project and identify the desired outcomes for completion of the project. Proponents need to understand the current situation as well as the intended program outcomes in order to develop their proposals.

In terms of budget information, there must be a balance between giving proponents enough information so they can prepare sound proposals and providing so much information that the ministry loses the advantages of this competitive process. As there are advantages and disadvantages to each method, it may be helpful to discuss this with Procurement and Supply Services (PSS). If the budget or volumes are estimates only, make it clear that they are subject to change.

What should I include as program requirements?
The section on program requirements should explain what is required from the project, emphasizing those elements considered crucial for inclusion in a proposal. For example, the minimum number of hours that services are to be available daily, the minimum number of clients the program must serve, or the minimum response time for a system are all examples of essential requirements of the project. Although a certain level
of detail is necessary in this description, ministries are cautioned to not get too detailed as creativity in the solution should be encouraged.

Should résumés be requested?

Yes. Résumés provide a basis for evaluating proponent qualifications and experience. However, to simplify the evaluation process, ministries may choose to provide proponents with a standard framework for summarizing qualifications and experience. The Request for Qualifications template available from PSS includes a format that ministries may find useful.

4.5 Evaluation Criteria

Evaluation criteria are considered one of the most important components of an RFP document as they define how proposals will be assessed and what makes one proposal better than another. There are two types of criteria: mandatory criteria and desirable criteria. The evaluation process that is discussed in Section 9 compares each proposal received to these evaluation criteria.

What are evaluation criteria?

Mandatory criteria are requirements that a proposal must meet in order for it to be considered. They are objective, project-related or administrative criteria that, when evaluated, will be answered with a ‘yes’ or a ‘no.’ If a mandatory criterion is not met, the proposal will not receive any further consideration.

If mandatory criteria are too restrictive or too difficult to meet, there is a risk that good proposals may be rejected. Therefore, it is important that mandatory criteria be critical to the success of the project and that the number of mandatory requirements be kept to a minimum. All mandatory requirements should be clearly listed in the RFP. The following are examples of mandatory criteria:

- Proposal must include evidence that at least one member of the project team is a registered Professional Engineer.
- The proposed mode of transportation must be able to accommodate at least six adult clients. Proposal must clearly state how many adult clients can be carried in the vehicle at one time.
- The proposal must be received at the closing location by the specified closing date and time.

Examples of mandatory criteria not to use might include the following:

- The qualifications of personnel on the proponent’s project team must be suitable for the role(s) proposed.
• Proponent must be knowledgeable about government policies and practices.

Ministries should also avoid using performance expectations as a mandatory criterion, as they can result in the unexpected rejection of proposals. For example, consider an RFP with the following mandatory criterion: “The Proponent must agree to meet the reporting standards detailed in Appendix D.” If a proposal does not specifically assert that it will meet the reporting standards in Appendix D, it will be rejected. It is better to include the performance expectation as a statement, rather than as an evaluation criterion, such as “The successful proponent will meet the reporting standards as detailed in Appendix D.”

Ministries should also take particular care with the word *must*. As this is a defined term, it should be used only when describing a mandatory requirement that must be met in order for the proposal to be evaluated. If subjectivity is required in determining whether or not a mandatory criterion is met, it may not be enforceable and should be treated as desirable criteria.

Desirable criteria define what the proposals are evaluated and compared against. They can usually be broken down into three key areas: price, qualifications and experience, and the proposed solution or approach. The RFP should describe the desirable criteria, including relative weightings, which will be applied during the evaluation process. Weightings will vary by requirement but care should be taken not to give price too low an importance, unless the RFP includes a mandatory budget that proponents must not exceed. It is a general rule that the lower the weighting for price, the more government ends up paying.

Desirable criteria will be different for each RFP and will reflect the individual needs and priorities of the ministry. These criteria can be presented as detailed requirements or as general ideas. However, the basis for evaluating proposals against these criteria must be prepared before any proposals are reviewed. These stated criteria and their relative weightings are the only criteria that can be used to evaluate proposals.

The following example illustrates a number of desirable criteria, their relative weighting, and a minimum score that must be achieved in each category.
<table>
<thead>
<tr>
<th>Desirable Criteria</th>
<th>Weighting</th>
<th>Available Points</th>
<th>Minimum Score</th>
<th>Proponent A</th>
<th>Proponent B</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suitablen of the proposed solution</td>
<td>100%</td>
<td>200</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>extent to which solution meets ministry needs</td>
<td>40%</td>
<td>80</td>
<td>50 (25%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>program creativity</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>ease of client access</td>
<td></td>
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<td>implementation plan</td>
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<td>effect on related programs</td>
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<tr>
<td>Proponent’s capability</td>
<td>25%</td>
<td>50</td>
<td>N/A</td>
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<td>the proponent’s experience on similar projects</td>
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<tr>
<td>qualifications and experience</td>
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</tr>
<tr>
<td>the skills of the proposed project team</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SUBTOTAL</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pricing</td>
<td>35%</td>
<td>70</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTALS</td>
<td>100%</td>
<td>200</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Example 1  Desirable Criteria Grid

Can I get help with defining evaluation criteria?  
Yes, PSS staff can help ministries define and develop evaluation criteria and relative weightings.

Are evaluation criteria other than those identified in the Request for Proposals used?  
No. The evaluation committee can evaluate a proposal only in accordance with the criteria and weightings provided in the RFP. However, the RFP will not usually show a detailed breakdown of how the ministry intends to award points for each of the criteria.

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

Not all RFPs require minimum scores; however, if minimum scores are being used, they must be disclosed to proponents.

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

Yes. It is possible, but it is unlikely. If the RFP uses minimum scores, it would not be possible since a proposal that does not achieve any of the minimum scores defined in the RFP will not receive further consideration during evaluation. In example 1, under proponent capability, where experience is given 25% of the total score, the ministry may have decided that experience is sufficiently important that it would be unwilling to enter into a contract with a company that did not have at least a minimum level of experience. In this case, the available percentage could be 25%, but proposals may be required to score at least 15% in order to receive further consideration.

Should I include a budget in the RFP?

The decision on whether or not to include a budget in an RFP depends on how the ministry wishes to evaluate price. The following points highlight some of the options used by ministries. Regardless of the approach chosen, the process for evaluating price must be clearly described in the RFP.

- One commonly used option is to not include a budget, let proponents offer their best price, and award points during evaluation for price. One of the difficulties with using this approach is that, unless price is given a significant percentage of overall value, a proponent with a high price, who also scores high for solution and capability, could be successful, while a proponent quoting half the price and with an adequate solution and adequate capability would not be successful. Ministries do not have the option of negotiating a significantly lower price with the successful proponent.

- A second option is to provide a rough budget figure and award points during evaluation for both price and solution.

- A third option is to tell proponents how much of a budget they have to work with and then not award any points for price. In this example you might simply make the budget mandatory and accept the best proposal: the one that provides the greatest value for the set dollar amount.

- A fourth option is to not provide a budget and accept the lowest priced proposal that meets a minimum standard. This is sometimes done by asking the proponents to submit their proposals in two envelopes. All proposals are evaluated for

Preparing RFPs: A Ministry Guide to the Request for Proposals Process
everything except price. After this, only those proponents who have attained the minimum scores will have their price envelopes opened. The proponent with the lowest price is the successful proponent.

- Another option is to not provide a budget, divide the proponent’s price by the number of points the proposal scores, and accept the proposal that offers the lowest cost per point. This approach has the effect of ensuring that proponents quoting high prices, where price has not been assigned adequate points, are less likely to be successful.

PSS has staff available to provide assistance in evaluating the advantages and disadvantages of each approach, and selecting the best option for specific circumstances.

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

References can be an important step in confirming the reliability and capability of proponents. If references are requested and will be checked, the RFP must explain how the process will work. For example, ministries may choose to check references for all proponents during the evaluation of proposals. Alternatively, a ministry may contact only the references for the proponent scoring the highest on evaluation of the desirable criteria. Checking references can be time-consuming but can be a valuable source of information during the evaluation.

If references are requested, be sure that they relate to the RFP and to the project. A common approach is to request contact names for the last three projects completed and/or contact names from the Province (other than from the program area issuing the RFP) of individuals who can provide project-related references.

Can I ask proponents for budget allocations?

Can proponent presentations be part of the RFP process?

How important is it to request references?

Yes. Proponent presentations can be built into the RFP process. If the intent is to create a short-list and invite proponents who make the list to deliver a presentation this should be clearly explained in the Evaluation and Selection section of the RFP. The RFP should specify the process for selecting proponents for the presentation phase and it should explain how presentations will be evaluated and scored. The most common approaches to evaluating presentations include:
• awarding an additional set of points for the presentations;
• including the points for the presentation as part of the original 100%; or
• not awarding points but using the presentations to support the evaluation of the information contained in the proposal.

4.6 Proposal Format

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

The RFP template includes the following guidance for the format of the proposal:

• an unaltered, completed, and signed RFP cover page including a Proponent Section;
• a table of contents including page numbers;
• an executive summary—a short (one or two page) summary of the key features of the proposal; and
• the body of the proposal (the proponent’s response).

The more direction provided to proponents on the information required, the better the proposals will be. Proponents should be directed to describe their proposed solution in the context of the desirable criteria presented in the RFP. The following is an example describing what the ministry wants to see in order to evaluate the suitability of the proposed solution.

Proponents should describe their proposed solution and specifically describe how it addresses each of the following:

1. **Extent to which the solution meets ministry needs**
   Proposals should identify each of the ministry’s stated requirements and explain how this requirement will be addressed.

2. **Program creativity**
   Proposals should give an overview of the proposed program, describing how it differs from existing services and how it uses technology to achieve its objectives.
3. **Ease of client access**
   Proposals should clearly describe the methods by which clients will access the program and should explain how services will be extended to clients who have difficulty leaving their homes.

4. **Implementation plan**
   Proposals should include a detailed implementation plan, including a plan for continuation of service during the six month transition period.

5. **Interaction with related programs**
   Proposals should explain how client file information will be exchanged with related programs and how confidentiality will be maintained without jeopardizing the integrity of the information.

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**Example 2  Suitability of Proposed Solution**

Many RFPs include a proposal checklist to help proponents create a complete package that addresses all mandatory and desirable criteria and administrative requirements. The following checklist is provided as an example of what can be included with an RFP.

- Everyone involved in creating the proposal has read and understood the requirements.
- The Receipt Confirmation Form has been submitted (if applicable).
- The proposal addresses everything asked for.
- The proposal meets all the mandatory requirements.
- The appropriate copies of the proposal have been made.
- The proposal clearly identifies the proponent, the project, and the RFP number.
- The proponent’s name and the RFP number appear on the proposal envelope.
- The proposal will definitely be at the closing location before the closing time stated in the RFP document.
- The proposal is being delivered using a method consistent with the terms of the RFP.
- The complete, unaltered RFP cover page has been originally signed and attached to the first copy of the proposal.
- If the proposal is being submitted through BC Bid’s eBidding functionality, all file attachments have been uploaded and the company e-bidding key has been entered.
4.7 Contract Form

Yes. Submission of a proposal indicates that the proponent agrees to enter into a contract with the Province if the proposal is successful. By building the contract form, with the standard terms and conditions, into the RFP document, submission of a proposal indicates the proponent’s acceptance of the terms and conditions for the RFP process, as well as the proponent’s willingness to enter into a contract with the defined terms and conditions.

The standard RFP template provides three contracting options: reference the standard General Service Agreement; select and attach the General Service Agreement and all applicable Schedules; or identify a number of government standard clauses that will be included in any subsequent custom contract that is developed with input from Legal Services Branch.

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

**Option 1**

If the General Service Agreement standard format (i.e., no additional schedules) will be used, the RFP drafter will select option 1 and delete options 2 and 3 from the template. To ensure proponents understand and accept the terms of the contract by which they will be bound, if successful, the contract template should be attached to or referenced in the RFP.

**Option 2**

If the successful proponent will be entering into a General Services Agreement with additional terms and conditions are provided for in attached schedules, the General Services Agreement and all relevant schedules are to be attached to the RFP document. The RFP drafter will then retain the wording for option 2 and delete the wording and instructions for options 1 and 3.

**Option 3**

The third option does not require that a contract format be included with the RFP but it does require the author of the RFP to identify all key contract terms and conditions that will be included in the contract that is negotiated with the successful proponent. The eventual contract will include negotiated terms and conditions as well as the standard requirements defined in the RFP document.

These standard terms and conditions are listed in the RFP template and address issues including: compliance with laws; arbitration;
funding; indemnity; insurance; registration with WCB; holdbacks; and intellectual property rights.

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

4.8 Receipt Confirmation Form

Every RFP document must include information on the process for advising interested proponents on any changes made to the RFP prior to the closing date and time. The standard RFP template includes a Receipt Confirmation Form (RCF) as Appendix A. Interested proponents are expected to complete and return this form to the ministry at the address provided. The completed RCF provides the ministry with the information needed to share any further information relating to the RFP, including amendments or minutes of any Proponents’ Meetings, with all proponents who have expressed an interest in the opportunity.

Do all RFPs use a Receipt Confirmation Form?

No. The RCF is not used with all RFPs, especially with RFPs that are posted on BC Bid. If a ministry intends to post any changes to the BC Bid website exclusively, the RFP must explain this process. BC Bid is an effective medium for communicating changes to interested vendors as BC Bid subscribers who have expressed interest in the opportunity will receive automatic e-mail notices when the opportunity is amended. If interested proponents are not registered BC Bid subscribers, the RFP document will need to advise them to review the posted opportunity on a regular basis to check for updates.
5 Safekeeping of the Request for Proposals Process

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

The contact person will receive questions, obtain answers, distribute the questions and answers to all known proponents, and issue amendments as necessary. All contact with proponents during the RFP process (i.e., questions and answers) should be formal and should be documented in writing.

The contact person may also be assigned responsibility for handling proposals received before closing time. Ideally, proposals will be stamped with the date and time of their receipt, and be placed unopened by the contact person in a locked box or drawer. Proposals should not be opened until after the specified closing time.

The contact person is often tasked with responsibility for ensuring that there is no uncertainty about when a proposal was received. All bids received by the closing time will be evaluated. Any proposal not received by the closing time should be returned to the proponent, unopened, with a covering letter explaining why it will not be considered.

Managing the flow of information between ministries and interested proponents is important to ensuring an RFP process that is fair and open. The greater the number of people responding to questions about an RFP, the more varied the responses to proponents can be, and the greater the risk that one proponent may consider that another proponent was provided with an unfair advantage. If a proponent believes that government has not followed the process as set out in the RFP document and that they have been treated unfairly, there is a risk that legal proceedings could result.

Yes. Proponents may request clarification of terms and conditions contained in the RFP, clarification of the evaluation criteria, or additional explanations about the specific ministry requirements. The role of the contact person is to ensure that all questions raised, and responses given, are documented and shared with other interested proponents.
<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
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</thead>
<tbody>
<tr>
<td>Can RFPs change after they have been advertised?</td>
<td>Yes. The standard terms and conditions for a government RFP provide the Province with the right to modify the terms of an RFP at any time, including the right to cancel an RFP at any time prior to entering a contract with the successful proponent. However, any significant changes to the terms of the RFP should be made far enough in advance of closing to give proponents adequate time to respond in their proposals. It is recommended that no changes to the procurement process, as stated in the terms of the RFP, be made after closing. If changes to the RFP document are necessary after closing, ministries are to obtain advice from their ministry procurement specialist and/or Legal Services Branch in the Ministry of Attorney General to ensure that a change will not result in any unfair treatment or prejudice to any proponent or significantly affect a proponent.</td>
</tr>
<tr>
<td>How do I communicate any changes to an RFP?</td>
<td>Any changes to the requirements or terms of an RFP are to be communicated as specified in the RFP document. A Receipt Confirmation Form (RCF) is one tool for ensuring all interested proponents are notified of changes. If the RFP was posted on BC Bid, any amendments should also be posted on BC Bid. Interested proponents can check the BC Bid website on a regular basis to look for updates, or they can subscribe to BC Bid and set up a profile to ensure they are automatically notified of any RFPs, and amendments to RFPs, that match their commodity profile.</td>
</tr>
<tr>
<td>Can the successful proponent back out if their plans change?</td>
<td>No. If a successful proponent chooses to withdraw their successful proposal, they are considered to be in breach of contract (i.e., in breach of Contract A). Submission of the proposal was an offer to the Province and acceptance of the successful proposal on the part of the Province results in a legal contract.</td>
</tr>
</tbody>
</table>
6 Identifying Potential Proponents

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

The number of firms or individuals invited to submit a proposal depends on the complexity and value of the opportunity being competed. Options range from directing a Request for Proposals (RFP) to three local vendors for an opportunity valued at less than $25,000, to posting the RFP on BC Bid to attract the interest of vendors over a much larger geographic area for an opportunity of significant value.

**How do I find potential proponents?**

One of the best ways to attract interest in an RFP is to post a notice on BC Bid and allow interested parties to download the RFP document from the site and/or include directions on how to obtain a printed copy. BC Bid is very effective for two reasons: the business community is increasingly relying on the Internet as the place to search for new contract opportunities, and it provides ministries with free advertising and document distribution. The notice remains on BC Bid until the RFP closes. The following is an example of a notice that has been posted on BC Bid.

**Interpretation Services**

The Ministry of Human Resources is looking for qualified interpreters to provide confidential interpretation and translation services for the clients in three regions of British Columbia: Vancouver, Lower Mainland/Coast, and Fraser North/Upper Valley. Services will be required across the Lower Mainland to non-English-speaking clients requesting immediate financial assistance. The ministry requires an agency or company to provide interpretation for approximately forty different languages and, depending on responses to this Request for Proposals, may decide to award contracts to two or more Proponents. Proposals will be accepted from Proponents who can meet the requirements specified in the Request for Proposals to provide professional interpretation services on short notice. Proponents may bid on provision of service for all or part of one, two, or three regions and on all languages or just some.

**Example 3 BC Bid Notice**

Advertising in a newspaper, a trade journal, or the Journal of Commerce (for construction projects) can be used as a supplement to the BC Bid notice (BC Bid notice is required by core policy for contract opportunities valued at over $100,000 for services or over $25,000 for goods), or as an alternative to BC Bid for contract opportunities under the policy thresholds. Very often, the ad will point interested parties to BC Bid as the place to obtain the RFP document. The Vancouver Sun is the only approved newspaper for advertising opportunities exceeding the core policy dollar value thresholds.
Newspaper advertising does not have the cost advantages of the Internet but can be desirable if a certain level of visibility, either province-wide or within a certain professional or geographic community, is desired.

Following is a sample newspaper ad.

Example 4    Newspaper Advertisement

Can I accept proposals from firms other than those invited?

Yes, provided that the proposals are delivered in the specified format and by the closing date and time.
## 7 Receiving Proposals

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
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<tbody>
<tr>
<td>Is it necessary for every proponent to submit a signed RFP cover page?</td>
<td>Yes. A person authorized to sign on behalf of the proponent must sign the cover page and include it with the first copy of the proposal. This step is critical as it binds the proponent to the statements made in their proposal, which provides the basis for both the bid contract (Contract A) and the performance contract (Contract B). The proponent signature also documents the proponent’s acceptance of the terms and conditions in the RFP document. If a cover letter is requested in lieu of the template cover page, the cover letter must contain the same language as the cover page to ensure the interests of the Province are protected.</td>
</tr>
<tr>
<td>Can proponents submit their proposal by fax or e-mail?</td>
<td>Standard practice is that proposals may be submitted only by courier or by hand. These options are stated in the RFP template. If a ministry chooses to accept proposals by fax or e-mail, it is important to clarify the proponent’s responsibility for completeness of the transmission and to have ministry procedures in place to confirm the closing time cut-off. Electronic submission of proposals through BC Bid is an option for ministries that post RFPs on BC Bid. For more information on the functions available through BC Bid, contact <a href="#">Procurement and Supply Services</a> (PSS).</td>
</tr>
<tr>
<td>How important are the noted closing date and time?</td>
<td>The closing date and time are of critical importance, as proposals received after that time will not be considered. Instead, they will be returned, unopened, to the proponent. This requirement ensures the fairness of the process as all interested proponents are held to the same standard.</td>
</tr>
<tr>
<td>If I have a history with a proponent do they still need to describe their experience in detail?</td>
<td>Yes. To be fair to all proponents, the evaluation process may consider only information that is included in the proposal. Therefore, all proponents must fully respond to the requirements of the RFP, regardless of their previous history with a ministry.</td>
</tr>
</tbody>
</table>
8 The Proponents’ Meeting

What is a Proponents’ Meeting?

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

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

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

Is a Proponents’ Meeting always required?

No. Ministries can choose whether or not to include a Proponents’ Meeting as part of their RFP process and whether or not to make attendance at the meeting mandatory. However, a Proponents’ Meeting can be very useful for interested vendors and is particularly recommended if:

- the requirement is complex;
- questions and concerns are anticipated;
- the requirement is such that joint proposals (i.e., two or more proponents partnering to develop a single proposal) would be beneficial to the ministry; or
- some of the information that proponents need was difficult to express in the RFP.

A Proponents’ Meeting will usually be held a week or two after the RFP is issued, and a few weeks before the closing date, in the city or town where the work is to be performed. The date and time of the meeting should appear in the RFP document, preferably on the cover page. If it is a major requirement or one where work might be done at a number of sites, ministries may conduct a series of meetings in different locations throughout the Province. To manage costs and time, ministries may consider allowing a Proponents’ Meeting to be conducted by teleconference for some participants. Teleconferences can be arranged through Government of BC Conferencing Services.
Copies of both the RFP document and the proponent guide should be made available at the Proponents’ Meeting. The introduction to the meeting should be brief. As most of the attendees will have read the RFP, a brief description of the intent of the RFP or the project will be sufficient. Generally, proponents are not asked to introduce themselves at the meeting but an optional attendance sheet may be circulated.

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is attendance at a Proponents’ Meeting mandatory?</td>
<td>A proponent’s attendance at the meeting should be optional unless the meeting incorporates a site visit to illustrate conditions that could not be described adequately in the RFP. If attendance at the Proponents’ Meeting is mandatory, this must be expressly stated in the RFP.</td>
</tr>
<tr>
<td>Is it necessary to record questions asked at a Proponents’ Meeting?</td>
<td>Yes. Minutes of the Proponents’ Meeting must be recorded. This record of questions asked and responses given must be made available to all proponents who have expressed interest in the opportunity (i.e., sent to those who have returned the Receipt Confirmation Form (RCF) and/or posted on BC Bid as amendment to the RFP document). The ministry may record the minutes themselves or arrange for verbatim transcription services. Although it depends on the length of the meeting and the amount of talking that is done, the average cost for the transcript is usually between $200 and $300. Procurement and Supply Services (PSS) can provide advice and assistance with arranging for transcription services.</td>
</tr>
<tr>
<td>How should questions be raised and answered?</td>
<td>The RFP will usually ask proponents to submit complex questions or those requiring anonymity in writing in advance of the meeting. That gives the ministry time to prepare a thorough answer. At the meeting, these questions and answers are read out without identifying who asked the question and further questions are invited from the floor. Questions that cannot be answered immediately can be answered in writing after the meeting and distributed as part of the minutes of the meeting.</td>
</tr>
<tr>
<td>Who should attend from the ministry?</td>
<td>The contact person(s) from the RFP should be at the meeting to ensure the fairness of information shared with proponents. The meeting can be chaired by a ministry employee or a PSS representative can be asked to chair the meeting on the ministry’s behalf.</td>
</tr>
<tr>
<td>Should an agenda be prepared?</td>
<td>Yes. It is a good idea to provide a meeting agenda.</td>
</tr>
</tbody>
</table>
The following is an example of a typical agenda.

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>10:30 a.m.</td>
<td>Welcome of proponents and introduction of ministry personnel, review of agenda, housekeeping (e.g., process for distribution of the minutes of the meeting)</td>
<td>Chair</td>
</tr>
<tr>
<td>10:40 a.m.</td>
<td>Overview of the project or program</td>
<td>Program manager</td>
</tr>
<tr>
<td>10:45 a.m.</td>
<td>Review of administrative requirements of the Request for Proposals</td>
<td>Chair or program manager</td>
</tr>
<tr>
<td>10:55 a.m.</td>
<td>Answers to written questions</td>
<td>Chair</td>
</tr>
<tr>
<td>11:00 a.m.</td>
<td>Answers to questions from the floor</td>
<td>Program manager and other ministry personnel as necessary</td>
</tr>
<tr>
<td>11:50 a.m.</td>
<td>Closing of meeting and information about distribution of minutes</td>
<td>Chair</td>
</tr>
</tbody>
</table>

Example 5  Proponents’ Meeting Agenda
9 Evaluation of Proposals

How are proposals evaluated?

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

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

Government policy (Policy 6.3.3.a.4) states that ministry staff must be part of the committee. The committee may be a combination of ministry staff and contractors but it may not be fully contracted out.

The committee may include: the program manager; a technical person; a financial person; a client representative; and a Procurement and Supply Services (PSS) representative. The number of people will depend on the complexity of the project. However, if the committee is too large it may complicate the process. A committee of three to six members usually works best.

All committee members should be present for the entire evaluation period and should be involved in reviewing all proposals. It is not unusual for the evaluation committee to ask for help from other areas of the ministry, such as asking the financial services group to run a spreadsheet to make pricing easier to assess and evaluate. However, the evaluation committee is still responsible for assigning a score to the proposals, which may consider the input received from other areas of the ministry.

Although the evaluation committee is not required to be involved until the evaluation process starts, the evaluation process will be much easier if the committee was involved in drafting the RFP and preparing the evaluation criteria.

Do I need to be concerned about potential conflicts of interest?

If a member of the evaluation committee is in a position of actual or perceived conflict of interest, the fairness of the entire RFP process may be questioned. Therefore, committee members and anyone else involved in preparation of the RFP should declare any potential conflicts of interest. This may be particularly relevant if the evaluation committee member is a contractor rather than a government employee.

The Standards of Conduct for Public Service Employees define a conflict of interest from the context of a public service employee and provide a number of examples. From the perspective of the RFP process, a member of the evaluation committee may be considered to be in a conflict of interest if the individual:

- has a friendship or familial relationship with one of the proponents;
• has a strong bias for or against one of the proponents;
• has a direct or indirect financial interest in a proponent’s business;
• has assisted in preparation of a proposal; or
• has received a gift from one of the proponents.

This list provides a few examples to illustrate the concept of conflicts of interest. If a member of an evaluation committee considers themselves to be in a position that constitutes a conflict of interest, or that could be perceived by someone else to potentially be a conflict of interest, the conflict should be declared and the individual may be asked to withdraw from the RFP process. For advice on issues related to real, potential, and perceived conflicts of interest, ministries may contact the British Columbia Public Service Agency, PSS, or Legal Services Branch.

During the evaluation process, committee members must treat all proponents fairly and equally, and evaluate their proposals in accordance with the process described in the RFP document. Care must be taken throughout the process not to take any actions or make any decisions that could be construed as providing an unfair advantage to any proponent(s).

As committee members are entrusted with or have access to information governed by the Freedom of Information and Protection of Privacy Act, they must ensure the necessary confidentiality of government and third party information. Evaluation committee members will be expected to:

• keep the proposals, and any notes they might make relating to them, in a secure place where others will not have access to them;
• refrain from discussing the proposals or disclosing their contents to anyone other than fellow committee members;
• retain copies of all notes and memoranda in accordance with the requirements of the Freedom of Information and Protection of Privacy Act;
• keep all notes, discussions, and point ratings confidential and not disclose their substance or details to anyone;
• evaluate the proposals strictly in accordance with the evaluation criteria stated in the RFP;
• evaluate proposals solely on information contained therein, not on the committee’s previous knowledge of the proponent or its business; and
• score proposals strictly in accordance with the methodology and point ranges established in the RFP.

The committee chair often asks committee members to sign a document to confirm their understanding of and agreement with their obligations as
committee members. This is particularly valuable where members of the committee are from outside the Ministry.

### When should the evaluation committee first meet?

The first meeting may not take place until after the closing date of the RFP. However, the committee will usually meet earlier in the process to obtain agreement on confidentiality requirements; review the evaluation criteria and draft scoring sheets; and make plans for subsequent meetings.

### How much of the evaluation process should be documented?

One of the members of the evaluation committee should be assigned responsibility for creating a master record of the scores and keeping notes explaining each score. This information forms part of the permanent record and may be made available to unsuccessful proponents during the debriefing. It is important to write supporting comments for both high scores and low scores. There is a natural tendency to put more emphasis on documenting the areas in which the proponent falls short. However, a benefit of documenting both positive and negative feedback is that, during debriefing meetings, the committee is able to comment on the proposal’s strengths as well as areas that require improvement.

### How should proposals be evaluated against the mandatory criteria?

The first step in the evaluation process is to check each proposal in turn for its compliance with the mandatory criteria. This step can be performed by the evaluation committee or it can be done by either a PSS representative or the committee chair. This must be done before the full committee sits to evaluate proposals. Assessing the mandatory criteria involves assessing whether the proposal meets or does not meet each mandatory criterion. Any proposal not fully meeting all mandatory criteria must be rejected without further consideration.

On rare occasions, often due to ambiguity in the wording of mandatory criteria, ministries may find themselves in a situation where a proposal does not absolutely meet the mandatory criteria in form but does meet it in substance. If faced with this situation, ministries are advised to consult with PSS or Legal Services Branch to determine whether or not the proposal is substantially compliant.

### How should proposals be evaluated against the desirable criteria?

After the mandatory criteria have been evaluated, proposals that meet all mandatory requirements are assessed against the stated desirable criteria. The two main methods of scoring the desirable criteria are:

1. the proponent’s response to each criterion is discussed and team members come to consensus agreement on the score; or
2. team members individually score the proposals and the proponent’s score is an average of the individual scores.
The committee can decide which method would work better. Usually, proposals will be evaluated one at a time and will be compared to the stated evaluation criteria. Because the criteria reflect the ministry’s needs, this is a more supportable approach than that of comparing each proposal to the others. An exception to this can be the evaluation of price.

When assigning points for price, ministries frequently use a formula that awards the lowest price full points (all points that are available for price) and then compares prices in the remaining proposals to this lowest price to determine a pro-rated point value. The points for price are awarded by multiplying the total number of points available for price (given to the lowest price) by the lowest priced proposal and dividing this result by the proponent’s price.

\[ S = \frac{\text{Min} \times M}{P} \]

- **S** = score
- **Min** = lowest priced proposal
- **M** = total points available for price
- **P** = price on this proposal

**Example 6 Pricing Formula**

PSS staff can provide information on options available to score price and can help identify the best approach for each situation. To avoid bias, the price formula should be established before any review of proposals is started.

**Example 7 Assignment of Points**

Example 7 is a matrix that illustrates a scoring guide for criteria other than price. The total point value that will be awarded for each criterion will be pro-rated by the weighting provided for in the scoring guide.

<table>
<thead>
<tr>
<th>Quality of response</th>
<th>Multiply the points available by this factor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellent; meets all of our requirements (100%)</td>
<td>1</td>
</tr>
<tr>
<td>A sound response; fully meets most of our requirements (80%)</td>
<td>0.8</td>
</tr>
<tr>
<td>Acceptable at a minimum level; meets our basic requirements (60%)</td>
<td>0.6</td>
</tr>
<tr>
<td>Falls short of meeting basic expectations (40%)</td>
<td>0.4</td>
</tr>
<tr>
<td>Does not address our needs (20%)</td>
<td>0.2</td>
</tr>
<tr>
<td>The response is completely unacceptable or the information is missing altogether (0%)</td>
<td>0</td>
</tr>
</tbody>
</table>

**How is price evaluated?**

**How do I develop a scoring guide?**
When should I check references?

The timing of reference checks and the approach to checking references will be dictated by the RFP document. In preparing an RFP, ministries need to determine and document whether references will be checked as part of the evaluation process or if they will only be checked once a successful proponent is identified. If the RFP states that references are to form part of the overall score (i.e., be part of the evaluation process), they must be checked for all proponents who meet the mandatory requirements. If the RFP states that references will be checked only to confirm the suitability of the successful proponent, they will be checked after the scoring is complete.

RFPs can also state that the ministry may check references. Evaluators can choose whether or not to check references, which will usually depend on how well the proposal responded to the RFP requirements. However, if the references form part of the evaluation process and are checked for one proposal, references should be checked for all that have met the mandatory requirements and minimum scores (if any).

Regardless of the approach chosen to check references, questions asked should relate directly to the evaluation criteria and the same questions should be asked of all references. Reference questions should be objective, such as “How did you find the proponent’s ability to respond to customer complaints?” Both the questions asked and the answers received must be recorded.

Under the Freedom of Information and Protection of Privacy Act, proponents may be entitled to know what was said about them by their references. It is preferable that the evaluation committee provide the score, rather than having the reference determine how a proponent has scored. For example, instead of asking, “Out of 15 points, how would you rate the proponent’s ability to meet deadlines?” it might be better to say, “Please describe the proponent’s ability to meet deadlines.” The committee can then assign a score to the response.

To ensure the fairness and relevance of references provided, RFPs will often request a reference from within government with whom the proponent has previously worked. In addition, the RFP document should always provide the Province with the right to check additional references, if it chooses.

Does the evaluation always identify a successful proposal?

Government policy (Policy 6.3.3.a.7) states that the contract must be awarded to the proposal that meets all mandatory criteria and minimum scores (if applicable), and achieves the highest rating against the desirable criteria. If none of the proposals received met the mandatory criteria, there will be no successful proponent. However, this is unlikely and, consequently, the evaluation process will normally identify a successful proposal. The evaluation committee will assess the proposals and total
the points. The proponent with the greatest number of points is the successful proponent.

At the end of the evaluation process, all evaluation committee members should sign the bottom of the summary spreadsheet to indicate their agreement with the conclusions.

How should the evaluation of proposals be documented?

The following table is an example of a scoring sheet that can be used to document the evaluation of proposals.

<table>
<thead>
<tr>
<th>Weighting Available Points</th>
<th>Minimum Score</th>
<th>Proponent A</th>
<th>Proponent B</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mandatory Criteria</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Required number of copies</td>
<td>Yes/No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tracking tool is compatible with ministry software</td>
<td>Yes/No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project team lead has required professional credentials</td>
<td>Yes/No</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Desirable Criteria</strong></td>
<td>100%</td>
<td>200</td>
<td></td>
</tr>
<tr>
<td><strong>Suitability of solution</strong></td>
<td>40%</td>
<td>80</td>
<td>50</td>
</tr>
<tr>
<td>Consistency of solution with program goals</td>
<td>30</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Creativity of proposal</td>
<td>25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Implementation plan</td>
<td>25</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Price</strong></td>
<td>35%</td>
<td>70</td>
<td>n/a</td>
</tr>
<tr>
<td>Score = (lowest proposed price/this price x total points)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Vendor Background</strong></td>
<td>25%</td>
<td>50</td>
<td>n/a</td>
</tr>
<tr>
<td>Experience</td>
<td>25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Team skills</td>
<td>25</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTALS</strong></td>
<td>100%</td>
<td>200</td>
<td></td>
</tr>
</tbody>
</table>

Example 8 Sample Scoring Sheet for Proposals
10 Notifying Proponents of the Decision

Should all proponents be notified of the result?

Government policy (Policy 6.3.3.b.1) requires that written confirmation of the evaluation process results be sent to the successful proponent, and that unsuccessful proponents be notified and offered the opportunity for a debriefing on their proposal.

Results should be announced to successful proponents first. Example 9 illustrates the wording that is recommended for notifying the successful proponent in a Request for Proposals (RFP) process.

Example 9  Letter to Successful Proponent

[Successful Proponent Name]
Re: Request for Proposals (Name and RFP Number)

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

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

Sincerely,

Example 10 illustrates the recommended wording for notifying unsuccessful proponents.

The time frame for notifying unsuccessful proponents will depend on how long it takes to negotiate the contract with the successful proponent. If a contract cannot be negotiated with the highest scoring proponent, the ministry can choose to negotiate a contract with the next highest scoring proponent, as all proposals received in response to an RFP remain valid for 90 days. To ensure that unsuccessful proponents are not released from their proposal obligations, they should be notified only after a final decision has been made. Example 10 illustrates the recommended wording for notifying unsuccessful proponents.
[Proponent Name]

Re: Request for Proposals (Name and RFP Number)

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

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

Sincerely,

Example 10  Letter to Unsuccessful Proponents: Contract Finalized

In situations where the contract can be prepared directly from the terms in the RFP, with little or no additional negotiation, the time lag between notification of the successful proponent and contract finalization will be short. However, if the negotiation period with the successful proponent is expected to extend over several weeks, the ministry may choose to notify unsuccessful proponents before the contract is finalized. This advance notification is undertaken to ensure that unsuccessful proponents learn of the decision directly from the ministry, rather than from outside sources. The wording illustrated in Example 11 should be used in these situations.
[Proponent Name]

Re: Request for Proposals (Name and RFP Number)

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

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

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

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

Sincerely,

Example 11  Letter to Unsuccessful Proponents: Contract Pending
11 THE CONTRACT

When will a contract need to be negotiated?

Ideally, everything from the successful proposal can be written into the government contract form that was attached to the Request for Proposals (RFP) document and the proponent will readily sign it. This is the case for the majority of contracts. Occasionally, though, some of the details will need to be worked out with the successful proponent.

If the best proposal would be unacceptable without significant change, the ministry should consider the option of announcing that the RFP process has concluded and no suitable proposal was received. If, however, the details that need to be worked out are relatively minor and do not substantially alter what was proposed, the ministry should proceed to negotiation of a contract with the lead proponent.

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

How do I plan for contract negotiations?

Preparing for negotiation is of vital importance and Procurement and Supply Services (PSS) is available to help ministries develop a negotiation strategy.

In planning for negotiations, ministries may want to:

- Supplement the general industry information that was gathered in the planning stage of the RFP with information specific to the successful proponent. It may be useful to have some awareness of the proponent’s other major clients and the current trends in the industry.
- Anticipate the proponent’s position(s), identifying and considering as many options as possible.
- Take time to consider the best and worst alternative to a negotiated solution with the proponent. If a ministry is in the position of absolutely requiring a contract, the ministry will be at a disadvantage.
- Consider the proponent’s best and worst alternatives in coming to an agreement with the ministry.
- Confirm the extent of authority vested in the individual responsible for negotiating the contract on the proponent’s behalf.
including the authority to approve the contract or to call off the negotiations.

- Confirm the extent of authority vested in the individual responsible for negotiating the contract on the Province’s behalf, including the authority to approve the contract or to call off the negotiations.

As ministries participate in the negotiation process, they should:

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

Whatever is agreed between the successful proponent and government must be included in the contract and must be clearly and explicitly written. For example, if the proponent has agreed to assign certain staff to the contract, and the ministry wants these to be the ones who do the actual work, the contract should identify them by name. Whenever possible, avoid the use of interim agreements, such as Letters of Intent or Memoranda of Understanding. Ideally, the only written agreement will be the final contract.

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How much detail should be included in the final contract?</td>
<td>Whatever is agreed between the successful proponent and government must be included in the contract and must be clearly and explicitly written. For example, if the proponent has agreed to assign certain staff to the contract, and the ministry wants these to be the ones who do the actual work, the contract should identify them by name. Whenever possible, avoid the use of interim agreements, such as Letters of Intent or Memoranda of Understanding. Ideally, the only written agreement will be the final contract.</td>
</tr>
<tr>
<td>Can I incorporate ideas from an unsuccessful proposal into the final contract?</td>
<td>No. This would be contrary to government policy.</td>
</tr>
<tr>
<td>Are there standard contract forms to use?</td>
<td>Yes. Government policy (Policy 6.3.3.d.4) specifies that the General Service Agreement should be used in all instances except:</td>
</tr>
<tr>
<td></td>
<td>- contracts for office assistance services or with employment agencies where a Corporate Supply Arrangement (CSA) exists;</td>
</tr>
</tbody>
</table>

Preparing RFPs: A Ministry Guide
to the Request for Proposals Process
• vehicle and equipment rentals;
• contracts for third party delivery;
• capital construction projects;
• service contracts requiring a guarantee or indemnity to the contractor by the Province; and
• any contract with a contract ceiling price greater than $100,000 before seeking advice from the ministry’s legal counsel on the use of the form.

No changes may be made to the General Service Agreement, whether pre-printed or electronic, without review by a ministry’s legal counsel.

The General Service Agreement is designed for all contracts for non-IT services and should also be used for IT services valued up to $100,000. This contract form includes the government’s terms and conditions related to insurance, indemnities, and rights to intellectual property that are appropriate for IT contracts. Additional information on government’s insurance requirements can be found on Schedule D of the General Services Agreement.

If the General Service Agreement is not appropriate, a ministry may develop an alternative contract, which legal counsel must approve. The Risk Management Branch must also approve the indemnity clause in any alternative form of contract where the Province indemnifies the contractor. Use of the contractor’s form of contract should be avoided.
12 DEBRIEFING

The debriefing meeting provides an unsuccessful proponent with the opportunity to learn about their proposal’s strengths and weaknesses. This feedback may help a proponent better understand government’s Request for Proposals (RFP) process and prepare successful proposals for future competitions by identifying areas that require improvement or clarification.

Although the unsuccessful proponent is often disappointed, the tone of the meeting should be positive and businesslike. The purpose of the debriefing is to provide feedback to the proponent on what they did well and what they could improve the next time. The debriefing session is not an appeal process and this should be clarified at the beginning of the meeting.

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

Debriefing meetings are normally conducted after a contract has been signed, as all proponents continue to be bound by their proposals until a written contract has been executed with the successful proponent.

In most cases, proponents will use the debriefing as a chance to impress the committee with their professionalism and find out how to do better next time. However, there will be some situations where an unsuccessful proponent will use the debriefing as an opportunity to challenge the committee’s decision. In preparation for the meeting, it is a good idea to prepare a copy of the individual proponent’s score sheet that summarizes where points were awarded, where they were lost, and supporting comments for each. If the debriefing can include positive comments on the proponent’s proposal, it will improve the success of the debriefing.

A separate meeting should be scheduled for each unsuccessful proponent requesting a debriefing. This allows the meeting to focus on the specific strengths and weaknesses with each proponent’s proposal, and it ensures the confidentiality of the proponent’s information and ideas.

The entire committee need not attend the debriefing. If Procurement and Supply Services (PSS) managed the RFP process, a PSS representative will
be available to chair the debriefing. In addition to the evaluation committee chair, one or two evaluation committee members should be on hand to discuss the committee’s findings.

It is also important to be aware of who will be representing the proponent at the debriefing. If the proponent’s lawyer is going to be at the meeting, consult with PSS or Legal Services Branch to determine who should attend to best represent the interests of the Province.

The chairperson will open the meeting by introducing the evaluation committee members present. He or she may also briefly set an agenda and establish the time available for the ministry’s overview and the time established for questions from the proponent.

Before starting the review, it is valuable to give the proponent a chance to voice any concerns or introduce items for discussion. This shows a willingness to respect the proponent’s investment in the process. Often any concerns expressed by the proponent’s representative are resolved during the debriefing once he or she sees that the process was conducted as described in the RFP and points were allocated fairly and consistently.

During the debriefing, a proponent will be told why their proposal was not successful and where they could improve on a future opportunity. Each proposal should be compared to the evaluation criteria and not to other proposals received in response to the RFP. Details of the successful proponent’s proposal or any other proposal should not be discussed, although the successful proponent’s overall score may be provided.

Information commonly released during the debriefing meeting includes:

- the proponent’s total score;
- the proponent’s detailed score and comments, at a level that the evaluation criteria was presented in the RFP; and
- the name of the successful proponent and the total contract amount.

Information that is not normally released during the debriefing includes:

- unit prices or hourly rates quoted by other proponents;
- individual scores of other proposals;
- details of the contract negotiations with the successful proponent;
- information about which personnel the successful proponent is going to assign to work on the project;
- the proponent’s ranking; and
- the names or scores of other unsuccessful proponents.
The *Freedom of Information and Protection of Privacy Act* defines how and when certain information can be shared by government; this applies to releasing information to vendors during and after an RFP process. If, during the debriefing meeting, there is any doubt about releasing material, it is best to decline to release it, promising to send the information later if it is releasable.

**Is there any advice we can provide to unsuccessful proponents?**

After reviewing the evaluation and answering any questions, proponents should be reminded of the guide prepared for proponents: *Responding to Government RFPs*. If the proponent is interested in finding out about other bidding opportunities, they should be directed to [BC Bid](#). At the end of the debriefing, assure the proponent that each RFP stands alone and the outcome of one process will not affect evaluation of their proposals in subsequent RFPs.

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

Although there is disappointment with not being successful, most proponents find the debriefing process provides useful feedback and satisfies them that the process was conducted fairly. If a proponent still has concerns with the process, they should initially address their complaint to the contact person identified in the RFP document. This step will initiate the [Vendor Complaint Review Process](#) (VCRP). The ministry will evaluate the issue and provide a response to the proponent. If the issue is not resolved to the proponent’s satisfaction, the proponent may raise the issue with the [Procurement Governance Office](#).
13 DOCUMENT RETENTION AND INFORMATION SHARING

How do I decide what documentation to retain on file?

A basic rule of thumb is that any record created during the RFP process is a document that must be retained. This includes: the RFP document, evaluation notes, scoring guides, reference check questions, responses from references, meeting notes, proposals received, proponent correspondence and responses, and negotiation information. When consensus scoring is used, the notes from the committee’s evaluation and scoring must be retained. However, any preliminary notes made by the evaluators in preparation for the committee meeting are usually considered transitory, in which case they may be destroyed.

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

How long should I retain RFP files?

Chapter 12 of the Core Policy and Procedures Manual defines the expectations for records management in government. The ARCS (Administrative Records Classification System) requires that all records created as part of a contract process, including an RFP process, be retained for seven years.

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

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

An RFP document, including the evaluation criteria, is routinely made available to any interested party as soon as it is issued. Minutes or transcripts of Proponents’ Meetings are also made available at any time after the meeting. Other documentation—including lists of proponents, evaluation notes, and scoring sheets—is not released until after the process is complete. In addition, the Act requires information that is determined to represent policy advice, cabinet confidences, personal information, third party business interests, and economic interests of public bodies to be severed. A proponent must make a formal request under the Act to access any information in the proposals of its competitors.

Advice on releasing information during a specific RFP process is available from procurement specialists or the Directors and Managers of Freedom of Information and Privacy in each ministry.
14 CONTACTS

The main branches within Procurement and Supply Services with responsibility for supporting government procurement activity are: Procurement and Supply Services, Strategic Acquisitions and Technology Procurement Branch, and IT Procurement Branch. Any branch can be contacted for advice and assistance related to the procurement process. The Procurement Governance Office is available to provide advice on the expectations of government procurement policy.

Procurement and Supply Services
Phone: 250 387-7300 (Victoria)
Fax: 250 387-7309 (Victoria)
E-mail: purchasing@gov.bc.ca
Website: http://pss.gov.bc.ca/

Strategic Acquisitions and Technology Procurement Branch
Phone: 250 387-1457
Fax: 250 356-0846
E-mail: SATP@gov.bc.ca
Website: http://ww.saip.gov.bc.ca/satp/contacts.htm

IT Procurement Branch
Phone: 250 387-8545
Fax: 250 356-0303
E-mail: ITprocurement@gov.bc.ca

Procurement Governance Office
Phone: 250 356-8331
Fax: 250 356-6164
E-mail: procurementgovernance@gov.bc.ca
Website: http://www.fin.gov.bc.ca/ocg/pgo/pgo.htm
15 Glossary and Definitions

Contractor
A contractor is a supplier to government who is providing goods or services subject to the terms and conditions of a contract with the Province. Most often, the term contractor is used to refer to a supplier of services.

Evaluation Committee
An evaluation committee is a group of individuals responsible for evaluating proposals received in a competitive procurement process, such as a response to a Request for Proposals (RFP). The evaluation committee will include some ministry representation and may also include a representative from Procurement and Supply Services (PSS).

Invitation to Quote (ITQ)
Invitation to Quote (ITQ) refers to the process and document used in government to solicit bids or quotes from vendors for the provision of clearly specified goods or services. The bids received in response to an ITQ are evaluated on price only.

Pre-qualification List
A pre-qualification list is a list of potential suppliers who have been pre-qualified for a specific or future procurement opportunity.

Proponent
The term proponent refers to a vendor who responds to a Request for Proposals (RFP) by submitting a proposal. The successful proponent is the vendor who is selected from the competitive process to supply government with the goods or services required.

Receipt Confirmation Form
The Receipt Confirmation Form provides the Request for Proposals (RFP) issuer with contact information for any interested proponents, so that additional information or amendments to the RFP can be distributed appropriately.

Request for Expressions of Interest (RFEI)
Request for Expressions of Interest (RFEI) refers to a process and document used in government to obtain information on the level of interest in a planned solicitation opportunity and may be used to pre-qualify vendors for an opportunity. It is often used when ministries know that a good or service is available but are not sure
if the vendor community is interested or available to compete on the opportunity.

Request for Information (RFI)

Request for Information (RFI) refers to a process and document used in government to obtain information to be used in developing a future solicitation opportunity. It is often used to obtain specific information about a product, service, or process, as well as the availability and performance of the goods or services.

Request for Proposals (RFP)

Request for Proposals (RFP) refers to the process and document used in government to solicit proposals from vendors which will be evaluated on price as well as other criteria, including vendor qualifications and the proposed solution.

Request for Qualifications (RFQ)

Request for Qualifications (RFQ) refers to the process used to pre-qualify suppliers who are interested in a current opportunity or for pre-qualifying suppliers who are interested in supplying goods or services in the future on an if, as, and when requested basis.

Solicitation

Solicitation involves the act of obtaining bids, quotes, offers, or proposals.

Supplier

The term supplier is often used interchangeably with the term vendor. However, in the context of government procurement, a supplier is a vendor who has been selected through a procurement process to supply government with goods or services.

Vendor

In the context of government procurement, any party that is in the position of being able to sell goods or services to government (i.e., a potential supplier) is a vendor. Solicitation processes are designed to solicit bids and proposals from many vendors.

Vendor Complaint Review Process (VCRP)

The Vendor Complaint Review Process (VCRP) is defined in government policy and overseen by the Procurement Governance Office. It is intended to provide access to a consistent, fair, and timely process to deal with vendor complaints concerning the government’s procurement process, and to identify ways to make improvements in that process. The process is limited to ministries and agencies that are governed by the Financial Administration Act.
16 QUICK LINKS

Agreement on Internal Trade (AIT)

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

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

Core Policy and Procedures Manual
http://www.fin.gov.bc.ca/ocg/fmb/manuals/CPM/06_Procurement.htm

Freedom of Information and Protection of Privacy Act
http://www.qp.gov.bc.ca/statreg/stat/F/96165_01.htm

General Service Agreement
http://pss.gov.bc.ca/psb/gsa/gsa_index.html

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

Procurement and Contract Management Program
http://www.fin.gov.bc.ca/ocg/pgo/pcmp.htm

Procurement Governance Office website
http://www.fin.gov.bc.ca/ocg/pgo/pgo.htm

Government of BC Conferencing Services
http://www.conferencingsolutions.ca/bc-government/index.php

Purchasing Handbook

Procurement and Supply Services (PSB) website
http://www.pss.gov.bc.ca/psb/

Request for Proposals (RFP) Template
http://www.pss.gov.bc.ca/psb/procurement/procurement-templates.html

Schedule D, Insurance Requirements, General Services Agreement
Standards of Conduct for Public Service Employees
https://employee.gov.bc.ca/src/sections.cfm?sectionID=455

Strategic Acquisitions and Technology Procurement (SATP) Branch
website—contact information
http://www.saip.gov.bc.ca/satp/contacts.htm

Vendor Complaint Review Process
http://www.fin.gov.bc.ca/ocg/pgo/VCRP.htm