Vendor / Contractor
Market Request Training

April – May 2019
Topics:

Competitive Bidding

Determine Selection Method

Components of an RFT
  • RFT Evaluation to Award

Components of an RFP
  • RFP Evaluation to Award

Award and De-briefing

Create Contract

Access to Opportunities

Response Planning

The Proposal Document
Competitive Bidding

Objectives

• Reach an agreement between Buyer (Municipality) and Seller (Supply) to deliver goods, services, and construction

• Competitive selection process that is open, fair and transparent

• Achieve value for money

• In compliance with governance

• Receive quality responses
Competitive Bidding

Process

Define Specifications and Scope

Determine Selection Method

Prepare & Issue Market Request (RFX)

Evaluate Responses

Select Vendor/Contractor

Award and Contract
Specification and Scope

Contents

• **Background** – Owner profile

• Mandate, who is involved, specific service, operational Requirements, reason for sourcing the requirement externally, frequency of the requirement

• What is the business issue?

• **Objective** – what must be achieved, one or multiple contractors, type of contractor (firm or individual), contract type – standing offer or specific purchase agreement?

• **Definitions and Reference documents**

• **Business and Technical Environment** – description of the business operations and technical operations and requirements. Hours of operation, services, service levels, technical infrastructure, systems etc.

• Specific obligations being placed on the contractor

• **Business and Technical Requirements** (contract requirements)
Determine Selection Method

Tendering Methods

1. Open Tendering
   • Public advertisement
   • Open to all
   • Suppliers respond as requested

2. Select Tendering
   • Open to select short listed suppliers

3. Multi-stage Tendering
   • Large number of suppliers
   • Culled to most suited through tender stages

4. Invited Tendering
   • Select vendors asked to bid
## Market Requests – RFX Documents

<table>
<thead>
<tr>
<th>Request Type</th>
<th>Purpose - Outcome</th>
</tr>
</thead>
</table>
| Request for Information      | • Used in the planning stage to assist in defining the project. Not used to select suppliers  
                                  • RFI’s do not typically result in contracts or shortlists                                                                                                   |
| Request for Pre-qualification | • Used to qualify and shortlist potential suppliers before seeking detailed offers through a Select Tendering Process  
                                  • RFPQ’s result in a short list of suppliers that will receive the RFT or RFP that follows                                                                 |
| Request for Quote            | • An RFQ is used to solicit competitive bids  
                                  • Solution(s), specifications, performance standard(s)  
                                  • Timeframe(s) are defined  
                                  • Award is made to the bidder with the lowest cost, product or service  
                                  • A quote is rarely a multiple step process and is typically used for low risk, low cost purchases                                                            |
# Determine Selection Method

## Market Requests – RFX Documents

<table>
<thead>
<tr>
<th>Request Type</th>
<th>Purpose - Outcome</th>
</tr>
</thead>
</table>
| Request for Tender   | • An RFT is used to solicit competitive bids when the solution(s), specifications, performance standard(s), and timeframe(s) are defined  
                       • It is used primarily for construction opportunities  
                       • Industry practices are well established, and often regulated  
                       • Potential bidders are familiar with the tendering process  
                       • Tenders are opened publicly and awarded to the compliant bidder with the lowest cost |
| Request for Proposal | • Alternative to the RFT, normally for the provision of services  
                       • Allows the vendor an opportunity to propose a solution to the Municipality’s requirement, which may include providing unique skills  
                       • Specifications are general in nature and performance based with pre-established criteria and weighting factors  
                       • The successful vendor is based on the best evaluated score, rather than just the lowest cost |
Components of an RFT

Major Sections

Invitation to Tender

- Project Description (summary), Contact Information, Closing date and time, Tender delivery details

Instructions to Bidders

- Definitions and Interpretation
- Scope, Clarification and Addenda
- Freedom of Information and Protection of Privacy Act
- Preparation of Bid
- Safety
- List of Alternatives
- Bid Submission
- Withdrawal and Modification

- Security
- Opening and Evaluating of Bids
- Post Closing
- Clarification and Negotiation
- Award of Contract
- Limitation of Liability and Applicable Law
- Insurance Requirements
- Miscellaneous
Components of an RFT

Major Sections

Acknowledgement Form
- Bidder information and acknowledgements – must be included with response

Bid Form
- Prices required for the Bid.

Appendices for Project Details
- Equipment Suppliers and Alternatives
- Key Personnel and Subcontractors
- Fees

Form of Agreement

Scope of Work
Components of an RFT

Definitions

Bidder

- The entity that is responding to the Request for Tender

Form of Contract

- Lump Sum agreement as attached

Project

- Scope which is to be performed

Scope

- means the work to be performed, services to be provided or goods, materials or equipment to be supplied and which is the subject of this Request for Tenders and identified in Appendix H – Scope of Work.
## Components of an RFT

### Request for Tender

**Title**: QU4873

**Project**: Wood Buffalo Spray Park Washroom

**Tender Closing Date**: April 25, 2019 at 14:00:59 Alberta Time

### Request for Tender (RFT) Information

<table>
<thead>
<tr>
<th>RFT Information</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title</strong></td>
<td>The title of the RFT is: QU4873 - Wood Buffalo Spray Park Washroom</td>
</tr>
<tr>
<td><strong>Contact</strong></td>
<td>Phone: (780) 787-5000</td>
</tr>
<tr>
<td><strong>Email</strong></td>
<td><a href="mailto:tenderinfo@woodbuffalo.ca">tenderinfo@woodbuffalo.ca</a></td>
</tr>
<tr>
<td><strong>Closing</strong></td>
<td>The closing for the RFT is: Date: April 25, 2019 Time: 2:00:59 Alberta Time. The closing time is determined by the data/time stamp machine at Fourth Floor, Reception Counter.</td>
</tr>
<tr>
<td><strong>Delivery</strong></td>
<td>Bids must be received at the following address before closing: Supply Chain Management 3900 Franklin Avenue Port McMurphy, AB T9K 0K4</td>
</tr>
</tbody>
</table>

### Table of Contents

- INVITATION TO TENDER
- TABLE OF CONTENTS
- 1.1.1 - TERM, DEFINITIONS AND INTERPRETATION
- 1.1.2 - SCOPE, CLARIFICATION AND STANDARDS
- 1.1.3 - FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT
- 1.1.4 - PREPARATION OF BID
- 1.1.5 - REQUEST FOR TENDERS – SAFETY
- 1.1.6 - LIST OF ALTERNATIVES
- 1.1.7 - SUBMISSION
- 1.1.8 - WITHDRAWAL AND MODIFICATION
- 1.1.9 - SECURITY
- 1.1.10 - OPENING AND EVALUATING OF BIDS
- 1.1.11 - POST-CLOSING clarification and negotiation
- 1.1.12 - AWARD OF CONTRACT
- 1.1.13 - LIMITATION OF LIABILITY AND APPLICABLE LAW
- 1.1.14 - INSURANCE REQUIREMENTS
- 1.1.15 - MISCELLANEOUS

### Appendices

- Appendix A - Acknowledgement Form
- Appendix B - Bid Form
- Appendix C - List of Alternatives
- Appendix D - Key Personnel
- Appendix E - Schedule
- Appendix F - Health and Safety Program
- Appendix G - Form of Agreement
- Appendix H - Scope of Work
RFT Evaluation to Award

Process

1. Open Bids
2. Commercial Compliance
3. Technical Compliance
4. Clarification
5. Select Vendor/Contractor
6. Award and Contract
Components of an RFP

Major Sections

Invitation and Submission Instructions

- Invitation to Proponents, RFX Timetable, submission instructions

Evaluation, Negotiation and Award (negotiation only applies to RFP)

- Overview of evaluation process, sequence of events and decisions points

Terms and Conditions of RFX Process

- General information and instructions, competitive bid conditions, governing law and interpretation

Form of Agreement

- Purchase contract sample
Components of an RFP

Major Sections

Submission Form

- Bidder information and acknowledgements – must be included with response

Pricing

- Instructions on how to provide pricing, overview of price evaluation process.

RFX Particulars

- The Deliverables - Scope of Work, specifications, requirements, deliverables, schedules
- Mandatory Requirements – Submission and Technical
- Rated Criteria and Weightings (RFP only)
- Suggested Proponent Content for Non-Price Criteria
  - This states the information needed in a submission

Additional Appendices as required.
Components of an RFP

Definitions

Bidder, Respondent, Vendor, Supplier or Proponent

- The entity that is responding to the requirement

Requirements

- Commitments you agree to by submitting a proposal

Mandatory Evaluation Criteria (P/F)

- If you fail then your bid is no longer considered

Rated or Non Mandatory Evaluation Criteria

- You can achieve a low score and continue on being evaluated

Weighting or weight

- A global weight out of 100 that is given to a rated or non mandatory item
Components of an RFP

TABLE OF CONTENTS

1. Invitation and Submission Instructions
   1.1 Invitation to Proposers
   1.2 RFP Content
   1.3 Type of Contract for Deliverables
   1.4 RFP timeline
   1.5 Submission of Proposals

PART 2 – EVALUATION, NEGOTIATION AND AWARD

   2.1 Stages of Evaluation and Negotiation
   2.2 Stage 1 – Mandatory Submission Requirements
   2.3 Stage 2 – Evaluation
   2.4 Stage 3 – Pricing
   2.5 Stage 4 – Banking and Contract Negotiation

PART 3 – TERMS AND CONDITIONS OF THE RFP PROCESS

   3.1 General Information and Instructions
   3.1.1 Proposers to Follow Instructions

The Municipality and its advisors make no representation, warranty or guarantee as to the accuracy of the information contained in this RFP or covered by way of addenda. Any quantities shown or data contained in this RFP or provided by way of addenda are estimates only, and are for the sole purpose of indicating to proposers the general scale and scope of the Deliverables. It is the proposer’s responsibility to obtain all the information necessary to prepare a proposal in response to this RFP.

3.1.2 Proposers in English

All proposals are to be in English only.

3.1.3 No Incorporation by Reference

3.1.4 References and Past Performance

3.1.5 Information in RFP Only an Estimate

The Municipality makes no guarantee of the value or volume of work to be assigned to the successful proposer. The agreement to be negotiated with the selected proposer will not be an exclusive contract for the provision of the described Deliverables. The Municipality may

APPENDIX A – FORM OF AGREEMENT

APPENDIX B – SUBMISSION FORM

APPENDIX C – PRICING

APPENDIX D – RFP ADDENDA

APPENDIX E – RFP PARTICULARS

APPENDIX F – RFP DISCLOSURES

APPENDIX G – OVERALL SUBMISSION REQUIREMENTS

APPENDIX H – MANDATORY TECHNICAL REQUIREMENTS

APPENDIX I – GENERAL CONDITIONS OF AGREEMENT

APPENDIX J – RATED CRITERIA

APPENDIX K – [List annexes or additional appendices]
Components of an RFP

Mandatory Requirements

3.2.3 Stage III
Stage III will consist of a scoring of the pricing submitted. The evaluation of price will be undertaken after the evaluation of mandatory requirements and any rated requirements has been completed.

3.3 Stage I – Mandatory Requirements, Submission and Rectification

3.3.1 Submission and Rectification Period
Other than inserting the information requested on the mandatory submission forms set out in this RFP, a proponent may not make any changes to any of the forms. Proposers submitting proposals that do not meet the mandatory requirements may be provided an opportunity within the Rectification Period to rectify any deficiencies.

3.3.2 Submission Form (Appendix B)
Each proposal must include a Submission Form (Appendix B) completed and signed by an authorized representative of the proponent.

3.3.3 Pricing Form (Appendix C)
Each proponent must include a Pricing Form (Appendix C) completed according to the instructions contained in the form as well as the following instructions:
(a) rates must be provided in Canadian funds, inclusive of all applicable duties and taxes except for GST, which should be itemized separately; and
(b) rates quoted by the proponent must be all-inclusive and must include all labour and material costs, all freight and carriage costs, all insurance costs, all costs of delivery to the Municipality, all costs of installation and set-up, including any pre-delivery inspection charges, and all other overhead, including any fees or other charges required by law.

3.3.4 Reference Form (Appendix D)
Each proponent must complete the Reference Form (Appendix D) and include it with its proposal.

3.5 Other Mandatory Requirements
- Completed Appendix H – Technical Specifications Sheet for AFRRCS Consoles and/or Appendix I - Technical Specifications Sheet for Fire Station Alerting System (FSAS) and/or Appendix J – Technical Specifications Sheet for AFRRCS Consoles 911 Dispatch Furniture
- Proof of Commercial General Liability Insurance of five (5) million dollars
- Proof of Automobile insurance of two (2) million dollars
- Completed Appendix HSE Questionnaire
- Proof of WCB Clearance

3.6 Rectification Period
Proposals satisfying the mandatory requirements during the Rectification Period will proceed to Stage II. Proposals failing to satisfy the mandatory requirements will be excluded from further consideration.

3.4 Stage II – Evaluation of Rated Criteria
Proposers should refer to Appendix E – RFP Particulars – Section C (Rated Criteria) for a breakdown of the Rated Criteria.

3.5 Stage III – Evaluation of Pricing
Proposers should refer to the Pricing Form at Appendix C and Appendix E – RFP Particulars – Section D (Evaluation of Pricing).
Components of an RFP

Evaluation Criteria

<table>
<thead>
<tr>
<th>Rated Criteria Category</th>
<th>Weighting (Points)</th>
<th>Minimum Threshold</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical Requirements</td>
<td>48</td>
<td>28.8</td>
</tr>
<tr>
<td>Company Experience</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>Project Team’s Experience</td>
<td>10</td>
<td>6</td>
</tr>
<tr>
<td>Pricing</td>
<td>32</td>
<td></td>
</tr>
<tr>
<td>Health and Safety Questionnaire</td>
<td>Pass/Fail</td>
<td></td>
</tr>
<tr>
<td>Total Points</td>
<td>100</td>
<td></td>
</tr>
</tbody>
</table>

Technical Requirements – Total Points = 48 Points
Technical requirements will be based on:

1. Ability to meet specifications outlined in Appendix H. (48 Points)

Company Experience – Total Points = 16 Points
Proponents must include a description of their experience in the provision and installation of equipment and services that match the specifications and requirements indicated in this RFP for P25 Consoles and/or Fire Station Alerting Systems.
Proponents must be experienced in supplying, installing and commissioning:
- P25 Consoles with the features and functions meeting at least 80% of those listed in the Consoles work package.
- Proponents must detail their most recent experience in the implementation of similarly sized systems for 9-1-1 Dispatch Centres and Fire Departments, and preferably in connection with interfacing P25 Consoles to AFRBCS. Proponents must have implemented at least two (2) similar solutions within Canada. Proponents are expected to possess detailed technical knowledge and capabilities to review and identify any problems, deficiencies and/or potential problems or deficiencies with the designed solution during the implementation.

Company Experience will be evaluated based on:

1. A description of their experience in the provision and installation of equipment and services that match the specifications and requirements indicated in this RFP for P25 Consoles. (10 Points)

Project Team Experience – Total Points = 10 Points
Proponents must present information pertaining to their project team members and their most recent experience in the execution of work that matches the functionalities and requirements of the deliverables requested in this RFP. The proponent must describe the project team and their roles and responsibilities. Specifically, the proposal must include:
- Key personnel qualification and experience as these pertain to the technical areas of
RFP Evaluation to Award

Process

1. Open Proposals
2. Commercial Compliance
3. Proposal Evaluation
4. Clarification and Presentations
5. Team Evaluation Scoring
6. Select Vendor & Negotiations

Award and Contract

Scoring
Evaluation Steps

1. Commercial Evaluation - check for compliance with commercial requirements (on-time, proof of insurance, WCB etc.)
   - Non-compliant? - Do not proceed

2. Technical Evaluation
   - Technical compliance
   - Safety and Environment
   - Skills, experience
   - Risk assessment
   - Quality Management
   - Methodology
   - Others as specified

3. Total Cost analysis
Evaluation Steps cont’d

4. Clarification questions
5. Presentations, if necessary
6. Individual scores
7. Committee consensus scoring
8. Select preferred proponents and recommend award
Notifications

1. Successful Bidder - high score, low price depending on Market Request type
   - Notified
   - Negotiation if applicable

2. Unsuccessful Bidders notified
   - Direct or through APC, MERX etc.

3. Debriefing
   - Opportunity to gain valuable feedback
   - Not an opportunity to dispute award

Award and De-briefing
1. Formal agreement created from Contract proposed in Market Request
2. Review Contracts carefully prior to signing
   - Direct or through APC, MERX etc.
3. Municipality may post results upon award or once the contract is signed
4. Some RFP’s limit the negotiation time for a contract
Municipal bid opportunities are posted publicly

In Alberta, opportunities are posted on the Alberta Purchasing Connection (APC)

Per Canadian trade agreements, NWPTA, CFTA and CETA
  - Goods and Services over $75,000
  - Construction over $200,000

RMWB will post notices on APC with a link to the new E-bidding system

E-bidding will support electronic RFX distribution and vendor communication, on-line bidding, on-line evaluations and e-mail notifications.

Register on the RMWB E-bidding system to gain access to documents and notifications for applicable categories.
Doing Business with the RMWB

The Regional Municipality of Wood Buffalo uses a formal procurement process to purchase goods and services from external businesses. When the Municipality identifies a need for a good or service, a tender (RFT), request for proposal (RFP), or request for quotation (RFQ) is issued to invite business to bid on the opportunity to provide the good or service. This procurement process ensures the acquisition of goods and services is done in an efficient, fair, transparent and cost-effective manner.

The Municipality has a new E-Procurement Program to make doing business with us easier. All Municipal bid opportunities and the associated documents are now available on our Bids and Tender Opportunities website. These opportunities will continue to be advertised on Alberta Purchasing Connection (APC). However, all bidding and awarding of Municipal contracts will be done through our E-Procurement Program.

Businesses are encouraged to create a free Bidding System Vendor account on our Bids and Tender Opportunities website. Vendors will be notified by email of any bid opportunity matching the commodity code(s) for goods, services and construction that are relevant to them. Please ensure to select all the commodity code(s) that are relevant to your business or that you are interested in when setting up your account. Vendors are responsible for ensuring their Bidding System Vendor account is kept up to date. Businesses that have previously registered as a vendor in the RMWB Vendor Registry, will need to re-register in the new E-Procurement Program.

Policies, Legislation and Rules Regarding Municipal Procurement

Bid opportunities are subject to legislated requirements such as the New West Partnership Agreement (NWPTA), the Canadian Free Trade Agreement (CFTA) and the Canada-European Union, Comprehensive Economic & Trade Agreement (CETA). The NWPTA agreement requires open and competitive procurement of:

- Goods and services of $75,000 or more; and,
- Construction contracts of $200,000 or more.

This means that the Municipality is legally required to ensure all bid opportunities in these thresholds are open to all vendors locally and outside of the region, while ensuring the procurement process is fair, transparent and accountable.
Response Planning

Key Considerations

After obtaining all relevant documentation:

- Carefully read the entire document
  - Do not assume all RFX documents are the same
- Understand the Owners requirements and needs
- Attend any pre tender briefing sessions being conducted
- Obtain all addenda
- Clarify any uncertainties
- Plan time to prepare your response
- Submit on time and at the right location
- Plan to comply with all mandatory requirements
To win, you must convince the evaluators you can meet and exceed the Owners' expectations.

Objectives

- To get the maximum number of points for each evaluated section
- To make the evaluator's decision to award maximum points as easy as possible
Content

- Follow instructions to the letter
- Balance the response vs. the evaluation criteria
- Address every point and sub point as requested
- Respond in the format requested
- Provide mandatory (must) requirements
- Be brief and concise or risk alienating the evaluators
- Use facts and supporting evidence – no unsubstantiated claims
- Differentiate – stress your superior differences in the industry
- Commit where commitment is sought
The Proposal Document

Content Cont’d

- Provide details of the project team’s relevant experience, qualifications and roles in completing the deliverables
- Check and prepare your references
- Use clear and direct language
- Include all “relevant” and requested documents
- Review and understand the referenced purchase agreement
- Only communicate with the RFX Contact Person

Be prepared to provide a presentation or interview, if requested.
The Proposal Document

Bidder Assumptions to Avoid

- We don’t need to provide all the mandatory information or documents
- Some of these RFX requirements do not apply to me
- Debriefing meetings are my opportunity to challenge the award, criticize the process or slam the competition
- We will have access to our competitors submission after the award
- We won’t be disqualified for discussing the RFX with Owners staff other than the Contact Person
Questions & Answers