



REGIONAL MUNICIPALITY  
OF **WOOD BUFFALO**

# Vendor / Contractor Market Request Training

April – May 2019



# Agenda

## 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

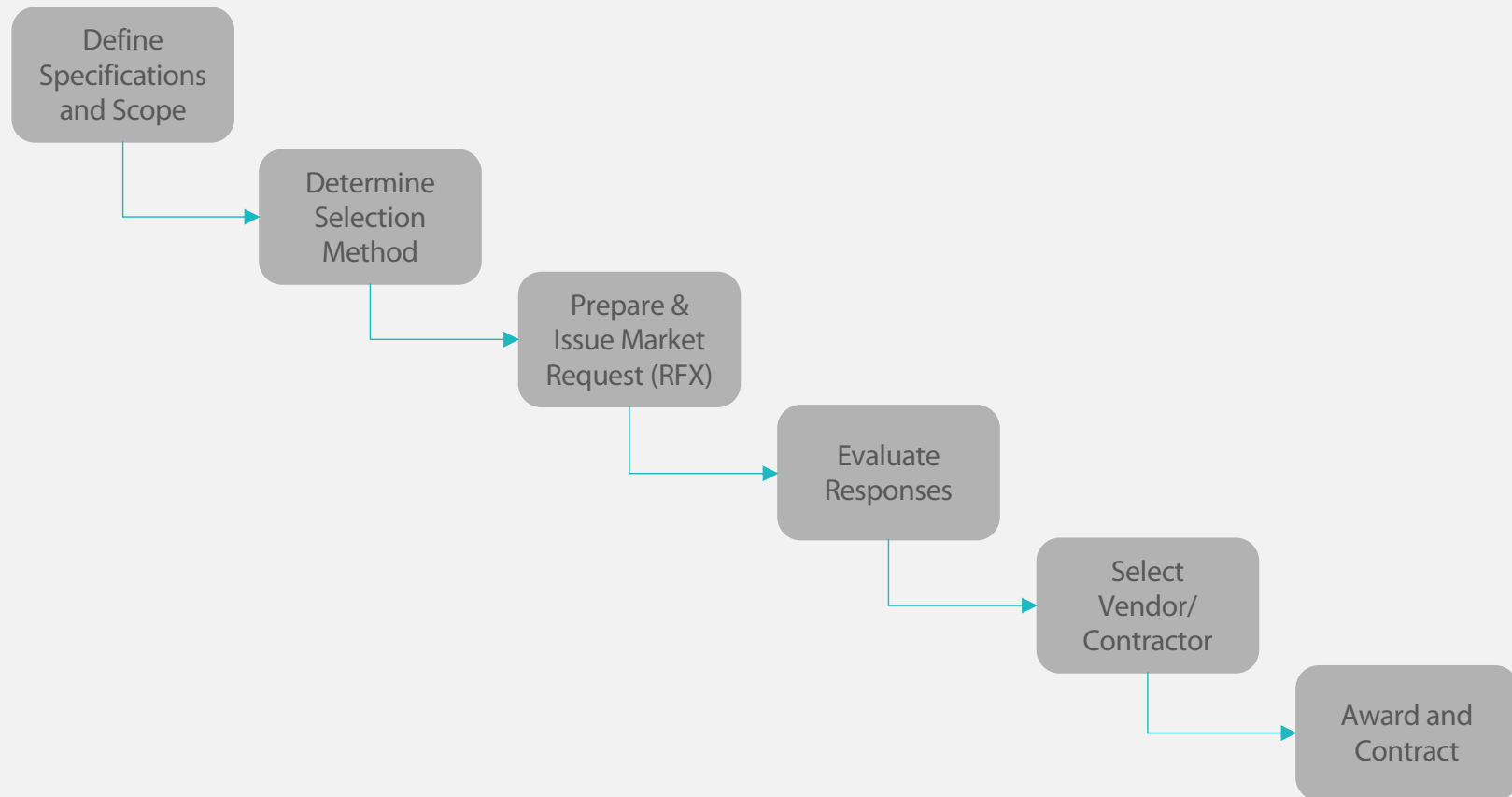
## Objectives

- 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



# 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

# Determine Selection Method

## Market Requests – RFX Documents

Request Type	Purpose - Outcome
Request for Information	<ul style="list-style-type: none"><li>• Used in the planning stage to assist in defining the project. Not used to select suppliers</li><li>• RFI's do not typically result in contracts or shortlists</li></ul>
Request for Pre-qualification	<ul style="list-style-type: none"><li>• Used to qualify and shortlist potential suppliers before seeking detailed offers through a Select Tendering Process</li><li>• RFPQ's result in a short list of suppliers that will receive the RFT or RFP that follows</li></ul>
Request for Quote	<ul style="list-style-type: none"><li>• An RFQ is used to solicit competitive bids</li><li>• Solution(s), specifications, performance standard(s)</li><li>• Timeframe(s) are defined</li><li>• Award is made to the bidder with the lowest cost, product or service</li><li>• A quote is rarely a multiple step process and is typically used for low risk, low cost purchases</li></ul>

# Determine Selection Method

## Market Requests – RFX Documents

Request Type	Purpose - Outcome
Request for Tender	<ul style="list-style-type: none"><li>• An RFT is used to solicit competitive bids when the solution(s), specifications, performance standard(s), and timeframe(s) are defined</li><li>• It is used primarily for construction opportunities</li><li>• Industry practices are well established, and often regulated</li><li>• Potential bidders are familiar with the tendering process</li><li>• Tenders are opened publicly and awarded to the compliant bidder with the lowest cost</li></ul>
Request for Proposal	<ul style="list-style-type: none"><li>• Alternative to the RFT, normally for the provision of services</li><li>• Allows the vendor an opportunity to propose a solution to the Municipality's requirement, which may include providing unique skills</li><li>• Specifications are general in nature and performance based with pre-established criteria and weighting factors</li><li>• The successful vendor is based on the best evaluated score, rather than just the lowest cost</li></ul>

# 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



REGIONAL MUNICIPALITY  
OF **WOOD BUFFALO**

## Request for Tender

**QU4873**

### Wood Buffalo Spray Park Washroom

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

## Request for Tender

### INVITATION TO TENDER

REQUEST FOR TENDER (RFT) TITLE	The title of this RFT is: QU4873 – Wood Buffalo Spray Park Washroom
PROJECT DESCRIPTION	Please use this title on all correspondence The Wood Buffalo subdivision central park includes a soccer pitch, basketball court, childrens playground and a water spray basin. The park does not currently have washrooms. This project is to install a precast concrete washroom facility.
CONTACT INFORMATION	The <i>Owner's Representative</i> for this RFT is: Name: Shaunnah Elser Position: Buyer Department: Supply Chain Management Email: <a href="mailto:tenders@rmwb.ca">tenders@rmwb.ca</a>  All inquiries must be directed, in writing, to the <i>Owner's Representative</i> . The <i>Municipality</i> is not responsible for any misunderstanding on the part of the Bidder. Questions will be deemed to be received once the questions submitted by Bidders have been received by the <i>Owner Representative</i> . Questions regarding this <i>Request for Tender</i> will be accepted via e-mail no later than five (5) <i>Business Days</i> prior to Closing.
CLOSING	The Closing for the RFT is: Date: April 25, 2019 Time: 2:00:59pm (Alberta Time) The Closing time is determined by the date/time stamp machine at Fourth Floor, Reception Counter.
DELIVERY LOCATION	Bids must be received at the following address before Closing: Supply Chain Management ATTN: QU4873 9909 Franklin Avenue Fort McMurray, AB T9H 2K4
	Award of Contract is subject to budget approval by council and availability of funds.



## Request for Tender

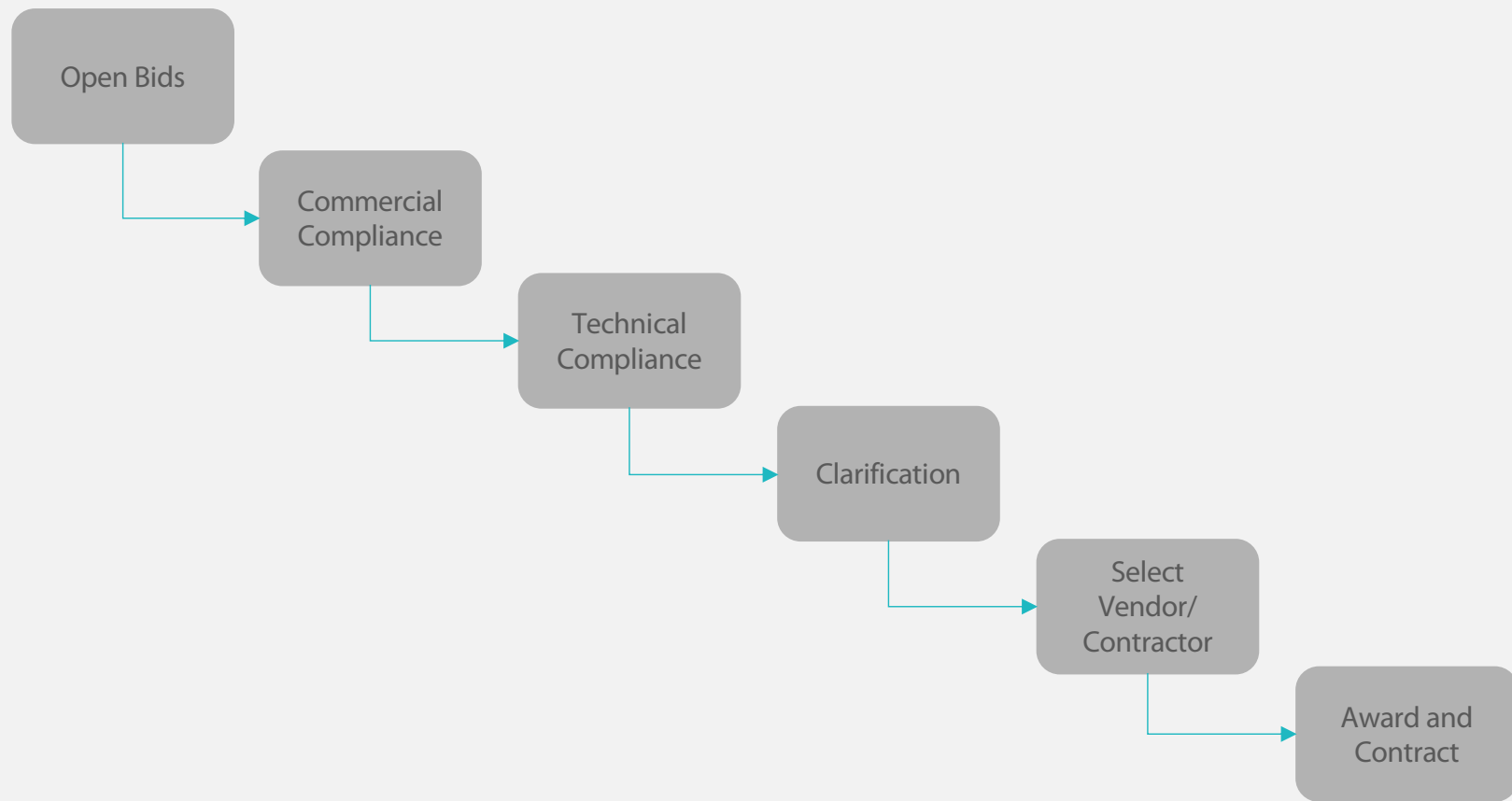
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# RFT Evaluation to Award

## Process



# 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



## Request for Proposals For [\*\*Insert Title of RFP\*\*]

Request for Proposals No.: [\*\*Insert RFP Number\*\*]  
Issued: [\*\*Insert Date of Issue\*\*]  
Submission Deadline: [\*\*Insert Date and Time\*\*] local time

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E. PRE-CONDITIONS OF AWARD.....	
F. RATED CRITERIA.....	

[\*\*List of annexes\*\*] [\*\*List annexes or additional appendices\*\*]

### PART 3 – TERMS AND CONDITIONS OF THE RFP PROCESS

#### 3.1 General Information and Instructions

##### 3.1.1 Proponents to Follow Instructions

Proponents should structure their proposals in accordance with the instructions in this RFP. Where information is requested in this RFP, any response made in a proposal should reference the applicable section numbers of this RFP.

##### 3.1.2 Proposals in English

All proposals are to be in English only.

##### 3.1.3 No Incorporation by Reference

The entire content of the proponent's proposal should be submitted in a fixed form, and the content of websites or other external documents referred to in the proponent's proposal but not attached will not be considered to form part of its proposal.

##### 3.1.4 References and Past Performance

In the evaluation process, the Municipality may include information provided by the proponent's references and may also consider the proponent's past performance or conduct on previous contracts with the Municipality or other institutions.

##### 3.1.5 Information in RFP Only an Estimate

The Municipality and its advisers make no representation, warranty or guarantee as to the accuracy of the information contained in this RFP or issued 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 proponents the general scale and scope of the Deliverables. It is the proponent's responsibility to obtain all the information necessary to prepare a proposal in response to this RFP.

##### 3.1.6 Proponents to Bear Their Own Costs

The proponent will bear all costs associated with or incurred in the preparation and presentation of its proposal, including, if applicable, costs incurred for interviews or demonstrations.

##### 3.1.7 Proposal to be Retained by the Municipality

The Municipality will not return the proposal or any accompanying documentation submitted by a proponent.

##### 3.1.8 No Guarantee of Volume of Work or Exclusivity of Contract

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

# 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. Proponents 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.

#### 3.3.5 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

#### 3.3.6 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

Proponents 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

Proponents 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

### Evaluation of AFRRCS Consoles Proposals:

Rated Criteria Category	Weighting (Points)
Technical Requirements	48
Company Experience	10
Project Team's Experience	10
Pricing	32
Health and Safety Questionnaire	Pass/Fail
<b>Total Points</b>	<b>100</b>

#### **Technical Requirements – Total Points = 48 Points**

Technical requirements will be based on:

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

#### **Company Experience – Total Points = 10 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 AFRRCS. 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:

- (i) 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**

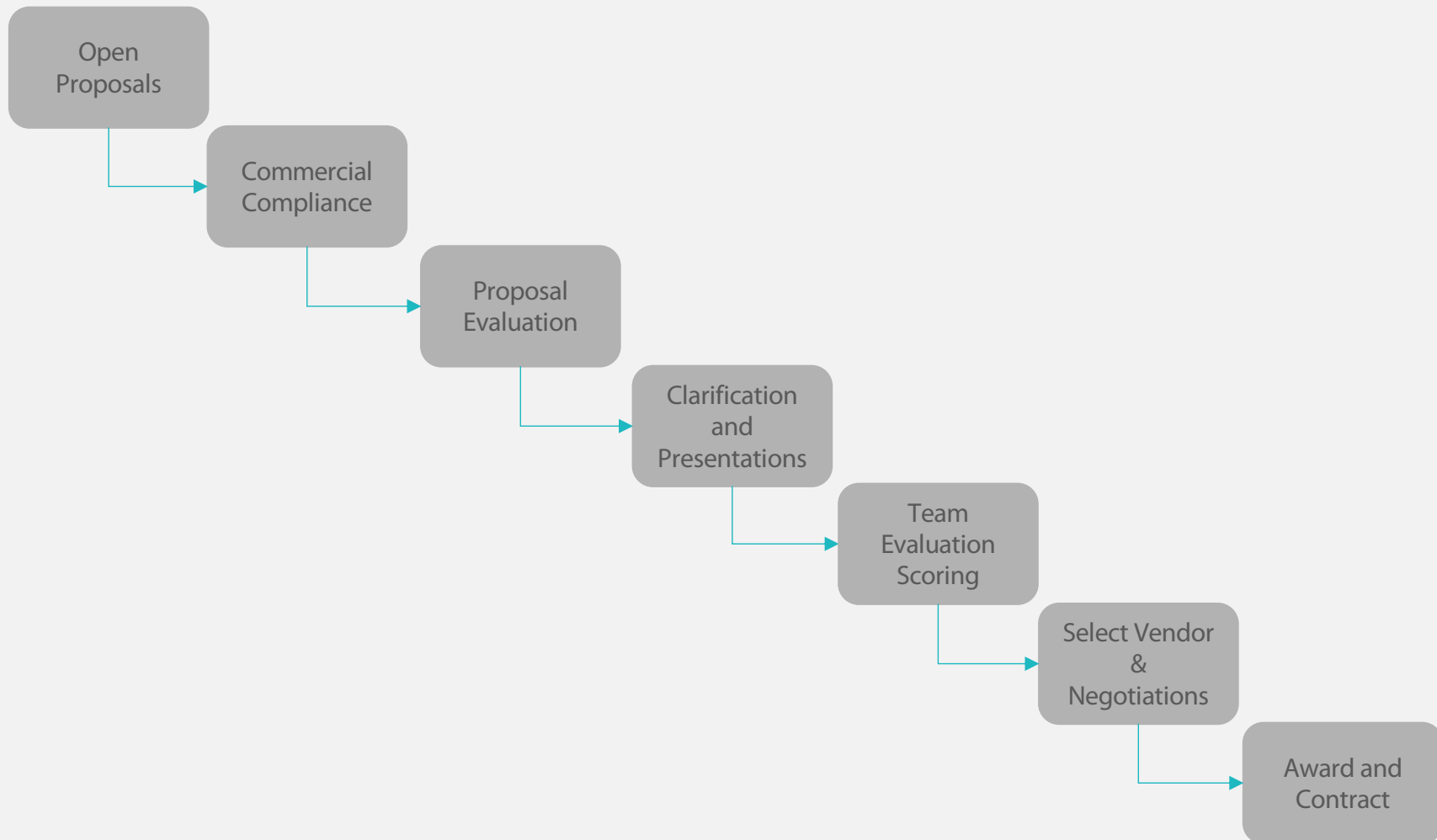
Proponents must present information pertaining to their project team members and their most recent experience in the execution of work that matches the functionalities and requirements of the deliverables requested in this RFP. The proponent must describe the project team and their roles and responsibilities. Specifically, the proposal must include:

- Key personnel qualification and experience as these pertain to the technical areas of the

Rated Criteria Category	Weighting (Points)	Minimum Threshold
Technical Requirements	48	28.8
Company Experience	10	5
Project Team's Experience	10	6
Pricing	32	
Health and Safety Questionnaire	Pass/Fail	
<b>Total Points</b>	<b>100</b>	

# RFP Evaluation to Award

## Process



# RFP Evaluation to Award

## 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



# RFP Evaluation to Award

## 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



# Award and De-briefing

## 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



# Create Contract

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



# Access to Opportunities

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.



# Access to Opportunities

REGIONAL MUNICIPALITY  
OF WOOD BUFFALO

LIVING

VISITING

DOING BUSINESS

MUNICIPAL GOVERNMENT

MUNICIPAL SERVICES

EMPLOYMENT

Municipal Departments

Chief Administrative Officer

Assessment & Taxation

Communications and Stakeholder Relations

Community and Protective Services

Community Services

Economic Development

Emergency Services & Law Enforcement

Engineering

Environmental Services

Financial Services

Indigenous and Rural Relations

Human Resources

Information Technology

Land Administration

Legal Services

Legislative Services

Planning & Development

Public Works

Office of the Municipal Auditor

> [Home](#) > [Municipal Government](#) > [Municipal Departments](#) > [Supply Chain Management Department](#) > Doing Business with the RMWB

## 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.

**E-Procurement Program**  
[Register and view opportunities](#)  
**Contact Procurement**  
[procurement@rmwb.ca](mailto:procurement@rmwb.ca)  
780-799-7000

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 [Bid 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 inside and outside of the region while ensuring the procurement process is fair, transparent and accountable.

# Access To Opportunities



REGIONAL MUNICIPALITY  
OF **WOOD BUFFALO**



## Welcome to the Regional Municipality of Wood Buffalo Bid Opportunities Website

[Bids Homepage](#) [Find more bids](#) [Create Account](#) [Login](#)

This site allows potential Bidders to create a Bidding System Vendor account. Bidders select commodity codes for goods and services and the Bidding System will notify the Vendor by email of Bid opportunities matching their commodity code selection.

Public tenders, bids and request for proposals are posted on this website.

Bidders are solely responsible for ensuring their Vendor account information is kept current.

For step by step instructions on how to create an Account please refer to the [Vendor Guide](#)

### IMPORTANT INFORMATION

The Regional Municipality of Wood Buffalo now uses bids&tenders to source for goods and services. This makes it easy for vendors to review, register and download, and submit bids online in one bidding system. The Notices only, for all procurement opportunities are posted on the [Alberta Purchasing Connection \(APC\)](#) website, however, the bid documents are provided on bids&tenders. A preview of the bid opportunity is available by clicking on the document download button.

*Bid documents posted before Monday April 29, 2019 will still continue to be found on APC.*

*Bid documents posted on or after Monday April 29, 2019 will continue to be posted on APC as an advertisement only as bid documents will be posted on bids&tenders.*

### Purchasing Support

To learn more about the Regional Municipality of Wood Buffalo Procurement refer to our website [www.rmwb.ca](http://www.rmwb.ca). Procurement activities are guided by our Corporate Policy and all applicable Trade Agreements.

If you have questions about a specific bid opportunity, please direct your inquiry to the contact person listed in the bid document. You may also contact the Regional Municipality of Wood Buffalo Purchasing department at 780-743-7000 or [procurement@rmwb.ca](mailto:procurement@rmwb.ca)

### Viewing Bids

Only open bids appear below, however by using the status dropdown list you may search historical or planned bids by selecting a status such as closed, planned, awarded, cancelled, etc.

Unofficial bid results for Invitation to Tender opportunities will be posted the same day as the bid closes.

### Technical Support

If you encounter technical issues, please contact [support@bidsandtenders.ca](mailto:support@bidsandtenders.ca)

The following is a list of our current online bid opportunities. Please refer to the Status column in the list to determine if the bid is open, closed or awarded.

Login

Create Account

Search



Open ▾

[Reset](#)

[Advanced Search](#)

Bid Name	Bid status	Bid Closing Date	Days Left
----------	------------	------------------	-----------

*There are currently no open bid opportunities available.*

< Page 1 of 0 >

Limit Results: 25 Showing 1 - of items

# 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



# The Proposal Document

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



# The Proposal Document

## 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