# APPENDIX D – RFX PARTICULARS guideline

[**\*\*Note:** Procurement to provide Appendix D to client for completion. Procurement to review, consult with client and revise as appropriate. Procurement to incorporate approved Appendix D into main RFx document before posting.**\*\***]

**Note to Client:**

* **The greyed-out text is included to provide guidance of what content is to be considered/included. Once updated, delete the greyed-out text.**

## A. THE DELIVERABLES

Describe all information material to the Deliverables – provide an accurate description of the goods and services (including anticipated quantities) using neutrally drafted specifications

1. Specifications may include any or all of the following:
   * 1. Physical characteristics;
     2. Functional, performance or expected results characteristics;
     3. Quality characteristics defined by recognized, third-party standards bodies; and/or
     4. Intended use descriptors such as consumer grade, industrial grade, medical or laboratory grade, or suitable for use under extreme conditions.
2. It is essential that the business requirements and specifications in a solicitation document be clear and comprehensive as they represent the “blueprint” that bidders will use to develop proposals and pricing. The requirements and specifications should answer the questions:
   1. What is required? (complete details of the goods and/or the full scope of services)
   2. When is it required? (delivery dates and/or timelines for performance)
   3. Where is it required? (location for delivery and/or performance)
   4. Why is it required? (intended use or purpose)
3. Specifications cannot be written in a way that unduly restricts suppliers from bidding, and should encourage open, fair and transparent competition. All specifications must be generic and non-branded.
4. Include references to associated documents when necessary, including the document #, document title, and revision:

* Drawings;
* Standards;
* Specifications;
* Data sheets;
* Etc

1. Information in this section should be categorized into sub-sections wherever possible. Examples of sub-sections could be as follows (these are just examples and not necessarily suited for all projects):

A.1 BACKGROUND INFORMATION

A.2 SCOPE OF WORK

A.3 EXPECTED DELIVERABLES

A.4 WORK LOCATION

A.5 WORKING HOURS

A.7 ACCESSIBILITY FOR ONTARIANS WITH DISABILITIES (AODA)

A.6 OUT OF SCOPE

## A.x ACCESSIBILITY FOR ONTARIANS WITH DISABILITIES (AODA)

[If there are no applicable AODA considerations, type “This section intentionally left blank” and provide an explanation as to why there are no applicable AODA considerations. Forms which do not comply with this requirement will be returned to the author and the RFx process will be put on hold until a compliant form is provided]

The Accessibility for Ontarians with Disabilities Act, 2005 (AODA) was enacted with the goal of developing enforceable accessibility standards that would prevent and remove barriers in Ontario and ensure accessibility for all Ontarians.

Section 5 of the AODA requires the College to incorporate accessibility criteria and features when procuring or acquiring goods, services or facilities, except where it is not practicable to do so. As such, completion of this section is **mandatory**, and in circumstances where it is not possible to complete this section an explanation as to why is required.

\*\*Describe all information material to developing, implementing and enforcing accessibility standards in order to achieve accessibility for Ontarians with disabilities with respect to:

* goods
* services
* facilities
* accommodation
* employment
* buildings
* structures
* premises

When procuring goods, services and facilities, the College is required to incorporate accessibility criteria and features into the purchasing criteria. Where applicable, solicitation documents must specify the desired accessibility criteria to be met and provide guidelines for the evaluation of bids in respect of those criteria. When developing its requirements and specifications for a procurement project, the Department must research the product(s) or service(s) and consider appropriate accessibility criteria and features. Think about any barriers the product or service might present for people with different types of disabilities and how the barriers can be avoided. Consider the following general principles of accessibility:

* Accessible: Can a person with a disability use the good/service at all?
* Equitable: Can someone with a disability use the facility as quickly and easily as a person without a disability?
* Adaptable: Can a user configure the item to meet their specific needs and preferences and will it work with common assistive technologies?

Consider the following examples of accessibility criteria for different types of purchases:

For Goods:

* Can the product be used by someone in a seated position?
* Can the product be used by someone with limited upper body strength, or limited fine motor skills; with vision loss or low vision; with hearing loss?
* Does the product meet ergonomic standards and can it be customized to meet a variety of needs?
* Are support materials, such as manuals, training or service calls, available in accessible formats at no additional charge?

For Services:

* Can the service provider accommodate the needs of people of all abilities? For example, if you’re hiring someone to conduct research, do their surveys and interviews accommodate people with different types of disabilities?
* Will the company use accessible signage, audio and/or print materials? For example, if you’re hiring an event coordinator, will they use high contrast signage for the event?

For Facilities:

* Can someone using a mobility aid, like a wheelchair or walker get around the facility?
* Are signs placed at an accessible height?
* Does the facility have emergency procedures to assist people with disabilities?

If you need further assistance in completing this section, you can refer to the following information on the [Purchasing Website](https://department.flemingcollege.ca/purchasing/policies-procedures/), or contact the Accessibility Facilitator:

(1) [the AODA Information for Procurement](https://department.flemingcollege.ca/purchasing/attachment/1597/download);

(2) [the AODA Overview Presentation](https://department.flemingcollege.ca/purchasing/attachment/1601/download);

(3) [the AODA Procurement Toolkit](https://department.flemingcollege.ca/purchasing/attachment/1615/download); and/or

(4) contact the Accessibility Facilitator.

## B. MATERIAL DISCLOSURES

Disclose all information material to the contract that could affect the proponent’s decision to bid or the proponent’s submitted pricing, including but not limited to: unusual site conditions; unusual processes or procedures; delivery or performance restrictions; any uncommon risks. If there are no material disclosures, insert N/A

1. In order to solicit competitive and responsive pricing during a competitive process, it is essential that bidders know all material information relating to the Procurement Project.
2. Only the Department’s subject area experts will be able to know what information should be disclosed in the material disclosures section of the solicitation document. The material disclosures section should be reviewed for every Procurement Project since failure to do so could expose the College to legal, financial and reputational risk.
3. Material disclosures include information such as:
   * 1. Reports relating to the Procurement Project, including engineering, consulting, environmental or site reports;
     2. Unusual conditions that may affect price (e.g. unusual site conditions, soil conditions, delivery restrictions, timing or delivery requirements or restrictions);
     3. Contractual performance terms;
     4. Indemnity, performance security and insurance requirements; and
     5. Specific or unusual processes or procedures expected of the successful bidder that are outside standard industry practice, or any uncommon risks.

## C. MANDATORY SUBMISSION REQUIREMENTS

### 1. Submission Form (Appendix B)

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

### 2. Pricing (Appendix C)

Each proposal must include pricing information that complies with the instructions contained in Pricing (Appendix C).

### 3. Other Mandatory Submission Requirements

Insert other mandatory submission requirements here, such as licences, certificates or other required forms or documents. Items should be included here only if they are essential to the evaluation process. Many potential mandatory submission requirements, e.g. proof of insurance, can be treated as pre-conditions of award instead, and be required only of the selected proponent. If there are no other mandatory submission requirements, insert N/A.

## D. MANDATORY TECHNICAL REQUIREMENTS

Insert mandatory technical requirements that the proponent must demonstrate with respect to the Deliverables before rated criteria can be considered. These must be capable of assessment on a pass/fail basis, and should not be confused with performance requirements that the successful proponent must perform if awarded the contract. Failure to adequately meet these requirements may result in disqualification of the proposal. If there are no mandatory technical requirements, insert N/A

Mandatory Technical Requirements may include:

* specific experience in a certain field/discipline
* specific licensing/certification
* specific technical or functional requirements – eg. operating range of a temperature control chamber; minimum or maximum size/weight of equipment, etc.

## E. PRE-CONDITIONS OF AWARD

Disclose any pre-conditions of award that must be met by the selected proponent before the contract can be awarded. For example, it is recommended that proof of insurance be required only of the selected proponent as part of the contract award process, rather than being a mandatory submission requirement required of all proponents. If there are no pre-conditions of award, insert N/A

## F. RATED CRITERIA

The following sets out the categories, weightings and descriptions of the rated criteria of the RFP. Proponents who do not meet a minimum threshold score for a category will not proceed to the next stage of the evaluation process.

[\*\*Insert any additional instructions on evaluation of rated requirements here, e.g. overall minimum thresholds, applicable tie-break protocols, general instructions on length of response, etc.\*\*]

|  |  |  |
| --- | --- | --- |
| **Rated Criteria Category** | **Weighting (Points)** | **Minimum Threshold** |
| i. Experience and Qualifications | [\*\*x points\*\*] | [\*\*Insert points or N/A\*\*] |
| ii. References | [\*\*x points\*\*] | [\*\*Insert points or N/A\*\*] |
| iii.[\*\*Set out Additional Criteria and Weighting and Describe Below\*\*] | [\*\*x points\*\*] | [\*\*Insert points or N/A\*\*] |
| **Pricing** (See Appendix C for details) | [\*\*x points\*\*] | [\*\*Insert points or N/A\*\*] |
| **Total Points** | [\*\*x points\*\*] | [\*\*Insert points or N/A\*\*] |

Suggested Proposal Content for Non-Price Criteria

[\*\*Set out the rated criteria in separate paragraphs and describe the information that proponents should include in their proposals for the purposes of the evaluation. Ensure the criteria correspond with the above table and be sure to include any information that you intend to evaluate. The text below is provided as an example\*\*]

i. Experience and Qualifications

Each proponent should provide the following in its proposal:

1. a brief description of the proponent;
2. a description of its knowledge, skills and experience relevant to the Deliverables; and
3. the roles and responsibilities of the proponent and any of its agents, employees and sub-contractors who will be involved in providing the Deliverables, together with the identity of those who will be performing those roles and their relevant respective expertise.

ii. References

Each proponent is requested to provide three (3) references from clients who have obtained goods or services similar to those requested in this RFP from the proponent in the last **[\*\*Insert no. of years**\*\*] years.

iii.

[\*\*Include a separate paragraph for each of the evaluation criteria included in the table\*\*]