# APPENDIX B – RFx PARTICULARS TEMPLATE

(Note to Client:

* Only complete the areas below with the greyed-out text. The greyed-out text is included to provide guidance of what content is to be included. Once updated, delete the greyed-out text.)
* For additional guidance in completing this document you may refer to the [RFx Particulars Template Guideline](https://department.flemingcollege.ca/purchasing/information-guidelines/how-to-buy-2/rfx-particulars-guideline/) located on the Purchasing Website.

## THE DELIVERABLES

[\*\*This section should provide a complete description of what we are acquiring from the vendor. Whether we are acquiring a good, service, construction, consulting, etc., everything we expect the vendor to provide, or that the vendor will be responsible for while under contract, belongs in this section. Think of this section as the Specifications or Scope of Work. You can add sub-sections (A.1, A.2, A.3, etc) with addition sub-headings as needed.

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

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

[If there are no applicable AODA considerations, type “This section intentionally left blank” and also 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.

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

[\*\*This section should not introduce additional performance requirements that are not included in Section A, however this section may provide additional information related to the performance requirements of Section A. 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\*\*]

##  C. MANDATORY SUBMISSION REQUIREMENTS

### 1. Submission Form (Appendix C)

Proponents should refer to the instructions attached to the solicitation for the Appendix C – Submission Form requirements and provide all required information in accordance with the instructions provided in the bidding system.

### 2. Pricing Form (Appendix D)

Each proposal must include pricing information that complies with the instructions set out in Appendix D – Pricing Form.

### 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

[\*\*Mandatory Technical Requirements are items we want the vendor to prove/demonstrate as part of the bidding process, they are not performance requirements while under the contract – those items belong in Section A.

Insert technical mandatory requirements that the proponent must demonstrate with respect to the Deliverables before price 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 bid.

If there are no mandatory technical requirements, insert N/A\*\*]

## 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. EVALUATION CRITERIA

(Note to Client:

* The Rated Criteria listed below are for example purposes only and should be modified to suit the specific objectives of each project.
* Will your award decision be based strictly on price?
* [ ]  Yes: If the award decision will be based strictly on Price, then this section does not need to be completed. Skip to Section G below.
* [ ]  No: If the award decision will be based on Price, as well as Non-Price Rated Criteria, then this section does need to be completed. Make your best attempt and Procurement will provide assistance to finalize.
* The BPS Procurement Directive requires that all criteria and weightings, including sub-criteria and sub-weightings, be disclosed in the procurement document.
* Environmental/Sustainability criteria should be considered wherever possible.
* References language should only be altered when absolutely necessary.

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, general instructions on length of response, etc.\*\*]

Proposal Content for Non-Price Criteria

The response to each rated requirement should:

* Be complete (bullet point format is acceptable);
* Be concise and factual; and
* Demonstrate the Proponent's understanding of the College’s business needs by providing answers validating its capabilities.

|  |  |  |
| --- | --- | --- |
| **Rated Criteria Category** | **Weighting****(Points)** | **Minimum** **Threshold** |
| **1.0** | **COMPANY PROFILE, EXPERIENCE AND QUALIFICATIONS** | **10** |  |
| 1.01 | Indicate how many years the company has been in business and the range of products and services currently offered.Describe three successfully completed projects involving the provision of services similar to those described in the Deliverables. Indicate if those projects were performed for a college, university, or other public sector entity. | 10 | N/A |
| **2.0** | **KEY PERSONNEL** | **20** |  |
| 2.01 | Identify the Key Personnel that would be assigned to perform cores aspects of the Work and explain how the Key Personnel are sufficiently qualified and experienced to deliver the Work. Include a CV for each Key Personnel. | 20 | N/A |
| **3.0** | **METHODOLOGY AND APPROACH** | **25** |  |
| 3.01 | Confirm your understanding of the requirements and describe the proposed methodology and approach for delivering the Work, including expertise involved, resources needed, methodology, quality assurance plan, and approach to minimizing and mitigating potential risks. | 25 | N/A |
| **4.0** | **WORK SCHEDULE** | **10** |  |
| 4.01 | Provide a schedule for performance of the services, including dates for commencement, key events, deliverables, and completion. | 10 | N/A |
| 5.0 | **ENVIRONMENTAL / SUSTAINABILITY** | **5** |  |
| 5.01 | Describe your organizations efforts in deploying initiatives that generate a positive impact on your environmental footprint/overall energy consumption, including any related certifications if applicable. | 5 | N/A |
| **6.0** | **PRICING (see Appendix D for details)** | **30** |  |
|  **TOTAL POINTS:**  | **100** |  |
| **7.0** | **References** (Note to Client: This section should not be altered, other than section numbering.) | **Pass/Fail** |  |
| 7.01 | 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.References will only be checked on the highest ranked proponent, on a pass/fail basis. If the highest ranked proponent fails the Reference Check process the College will move to the next highest ranked proponent. Proponents who do not successfully pass the Reference Check process will not be considered for award, and the College will have no further obligations to any proponent that does not successfully pass the Reference Check process. | Pass/Fail | Pass |

## G. PRICE EVALUATION METHOD (Note to Client: Procurement will determine the Price Evaluation Method, based on the Deliverables outlined in Section A.)

Pricing is worth [\*\*Insert Weighting\*\*] points of the total score.

Pricing will be scored based on a relative pricing formula using the rates set out in the pricing form. Each proponent will receive a percentage of the total possible points allocated to price, which will be calculated in accordance with the following formula:

$$lowest price÷proponent^{'}s price × weighting=proponent^{'}s pricing points$$

[\*\*If using a pricing formula or methodology other than the relative pricing formula set out above, delete and update this section as applicable\*\*]