

Template Preparation Guide: Request for Supplier Qualifications (RFSQ) Framework with Master Agreement

INTRODUCTION

This guide is intended to provide information and support to public entities in the development and use of Request for Supplier Qualifications (RFSQ) Template Framework with Master Agreement, updated Fall 2017.

Current templates are available through the SaskTenders, SaskBuilds and Crown Investment Corporation websites. The terms and conditions contained in these standard templates are regularly modified to reflect changes in legislation, contracting practices or procurement law. Public entities should ensure that the most recent versions of the RFSQ templates are used.

The RFSQ template contains important areas that need to be well developed in order to create a strong document that is easy for suppliers to understand and respond to, and for the evaluation team to review. This guide will lead you through the process of completing the RFSQ template.

This document will provide guidance referencing the specific sections of the template that require input of information or data.

The template is a starting point for the creation of a customized procurement document. The intent is that you will customize the template to match your specific competition by inserting the additional information directed in the template instructions. The intent is also to maintain a common look and feel for government competitions.

Other useful documents to be referenced are within the Procurement Guide and they are the Scope of Work Writing Guide and the Guide to Preparing a Request for Proposal.

IMPORTANT NOTE:

This template is the correct template if you:

- Intend to create a prequalified list of suppliers requiring them to enter into a Master Service Agreement.
- Intend to conduct invitational competitions amongst the suppliers on your prequalified list.
- Intend to evaluate criteria other than just price.
- Do NOT intend to create a Contract A with the proponents submitting Responses.
- Intend to have Responses NOT be irrevocable.

Part 1 – Invitation and Submission Instructions

1.1 Invitation to Respondents

The introduction should provide an overview of the project so that suppliers will understand the business problem or need that exists and be able to quickly determine if they ought to pursue prequalification. Be sure to include the name of the public entity that is requiring the good or service.

Any mandatory requirements, such as qualifications, should be included in the introduction. If there is a long list of mandatory criteria you may want to refer to Appendix A for details.

You should include an overview of the deliverable and any special/unique requirements are to be included in this section as well.

The introduction often appears in the synopsis or overview section on the SaskTenders website when posting the RFSQ.

The first paragraph requires the input of a “title of RFSQ” this should match the title listed on the front page of the template.

1.2 RFSQ Contact

Insert the name and email of the RFSQ contract.

1.3 Master Agreement

This section advises respondents that they may be invited to enter into a Master Agreement and that agreement will govern any worked awarded under any invitational competition. This area will also specify the term of the agreement and any option years.

1.4 RFSQ Timetable

Insert the applicable dates for the RFSQ milestones.

1.5 Submission of Responses

Insert any special instructions as applicable.

1.5.1 Responses to be Submitted at Prescribed Location

Indicate what method(s) are acceptable for the submission of Responses. This could include hardcopy, email, fax or if available electronic submission.

1.5.3 Responses to be Submitted in Prescribed Format

Indicate the number of copies of Responses required. You should also indicate the type of copies, how many hard copies and how many electronic copies.

Part 2 – Evaluation of Responses

This section details the steps that you will take in the evaluation of submitted Responses. This template has suggested steps to be taken. You may modify this section to match your competition. Some competitions list the checking of references as a separate and distinct step in the evaluation process.

2.3 Stage II – Evaluation

Indicate the sub stages of your evaluation.

2.4 Ranking and Selection

This section describes the options for ranking and selection you can consider for your particular competition.

Part 3 – Terms and Conditions of the RFSQ Process

It is important that you read and understand all of the clauses within this section of the RFSQ. Most of the clauses do not require modifying or customizing. Those clauses that may include an instruction for further information or some form of customization are clearly marked.

Appendix A – RFSQ Particulars

This appendix will be used to detail the required deliverables or the scope of work for the competition. There should be a direct relationship to what is required as deliverables or the scope of work and what is being requested as part of the proponent's submission for evaluation purposes which also in turn will correspond with the evaluation criteria.

A. Deliverables

Where ever possible the deliverables or the scope of work should be described in terms of outcomes, results or performance specifications.

B. Material Disclosure

We are obligated to fully disclose any information that might affect the proponent's ability to fulfill the requirements of the resulting agreement

C. Mandatory Requirements

Provide a complete list of all mandatory requirements that have to be met to be considered compliant and thus considered viable to move to the written evaluation. CAUTION: It is advised to consider very carefully what is considered mandatory.

This is a case of less is better than more. Mandatory items are show stoppers so don't inadvertently eliminate viable proponents or viable solutions with the prolific use of mandatory criteria.

The next area provides some options for Crown Corporations on the application of the trade agreements.

D. Rated Criteria

Fill in the table to detail the evaluation criteria that will be employed in the RFSQ with the corresponding weight of each criterion. If you plan to set a pass mark for each criterion this should also be detailed.

Provide detailed information for each criterion as to what information you require to do a full assessment of that criterion. Take the time required to think through what you believe you need to know to be able to assess each response. Only ask for information you plan on assessing (see the Guide to Preparing a Request for Proposal).

D2. References

It is common to ask for references for the last 5 years. It is also common to use ourselves as a reference or to indicate that we may use global references or any know client of the proponent.

Appendix B – Master Agreement

This section should detail the invitational procurement process and the service level agreement that will be applicable.

Appendix C – Submission Form

This appendix will be attached to the RFSQ and is to be completed by the proponent and included in its submission.