

# Template Preparation Guide:

## Request for Proposal (Best and Final Offer) Template

## **INTRODUCTION**

This guide is intended to provide information and support to public entities in the development and use of Request for Proposal (RFP) Best and Final Offer (BAFO) Template, updated Fall 2017.

Current RFP 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 RFP templates are used.

The RFP 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 RFP 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 RFP.

## **IMPORTANT NOTE:**

This template is the correct template if you:

- Intend to evaluate criteria other than just price
- Do NOT intend to create a Contract A with the proponents submitting proposals
- Intend to have proposals NOT be irrevocable
- Intend to have the option to conduct a BAFO process
- Intend to only conduct only minor negotiations with the successful proponent and if not successful you have the right to negotiate with the next highest rated

## **Part 1 – Invitation and Submission Instructions**

### **1.1 Invitation to Proponents**

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 the contract. Be sure to include the name of the public entity that is requiring the good or service, and the desired length of the contract including any option years.

Any mandatory requirements, such as qualifications, location, and maximum budget, 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 RFP.

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

### **1.2 RFP Contact**

Insert the name, email of the RFP contract

### **1.3 Type of Contract for Deliverables**

This section will specify how many possible agreements could be awarded based on this competition. It will also detail the period of the agreement, including any option years.

### **1.4 RFP Timetable**

Insert the applicable dates for the RFP milestones. Insert additional dates for any additions steps in your procurement process such as bidders’ conference, site visits, oral presentations or scripted demonstrations.

### **1.5 Submission of Proposals**

Insert any special instructions as applicable. You may want to indicate here if you require the financial proposal to be submitted separately from the technical (written) proposal and that they be in separate sealed envelopes indicating the contents of each and referring to the competition title and RFP reference number.

#### **1.5.1 Proposals to be Submitted at Prescribed Location**

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

### **1.5.3 Proposals to be Submitted in Prescribed Format**

Indicate the number of copies of proposals required. If you have four members on your evaluation team you may want to request four hard copies. You should also indicate the type of copies, how many hard copies and how many electronic copies. Some competitions may require the submission of samples; you can provide details on the requirements for samples in this section.

## **Part 2 – Evaluation of Proposals**

This section details the steps that you will take in the evaluation of submitted proposals. This template has suggested steps to be taken. You may modify this section to match your competition. If you plan to produce a short list of suppliers to make a presentation you will indicate that in this section. Some competitions list the checking of references as a separate and distinct step in the evaluation process.

### **2.3 Stage II – Evaluation**

Indicate your evaluation criteria in Appendix A.

#### **2.5.1 Contract Negotiation Process**

This section describes the process that will be used for negotiations. The following two section discuss the Time Period

## **Part 3 – Terms and Conditions of the RFP Process**

It is important that you read and understand all of the clauses within this section of the RFP. 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 – RFP 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. The use of brand names should be avoided, including when we state the requirement as "brand x or equivalent". Rather, we should state that we are aware of brands x

and y and that we are also open to consider other brands that can meet the intent of the specifications or requirements (See the Scope of Work Writing Guide). It is understood that at times a product or a component of a product may be required as mandatory but if at all possible the intent is to describe the good or service in a way that will allow for more competition rather than less.

#### **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. This could include disclosing items such as "in completing the renovations the proponent is advised that the walls contain asbestos". This is just an example but the idea is that we have a duty to disclose all know information to proponents.

#### **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 RFP 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 proposal. Only ask for information you plan on assessing (See the Guide to Preparing a RFP).

#### **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 – Pricing Form**

Provide instructions on how to complete the pricing form. The pricing requested should match with the deliverables being requested. You may request individual item pricing or a lot price. You should also decide if you require separate pricing for options or additional warranty or freight. You should be familiar with the unit of measure that may be standard in the industry for the deliverables you require. You may indicate if you will accept alternative units of measure.

**Appendix C – Form of Agreement**

You should attach a copy of the resulting agreement that the proponent will be agreeing to.

**Appendix D – Submission Form**

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