



College Policy & Procedures Manual	
Category	Financial Legal
Policy #	3.2.2

3.2.2 Coordinated Purchasing System

POLICY

The College has a coordinated purchasing system for managing the procurement of goods and services.

PURPOSE

As a publicly funded institution, the College is responsible to ensure adequate monitoring and control of public funds. It shall endeavor to achieve the best overall value for money while maintaining the highest standard of integrity in full compliance with the law.

Purchasing practices will align with the value of the planned purchase, such that a more rigorous process will be followed for those purchases that have a higher impact on the College in areas such as finance, safety or reputation.

SCOPE

Note: All threshold amounts referred in this policy are inclusive of net taxes payable by the College.

All purchases within approved budgets shall be subject to College policies and procedures and shall be processed using one of the following purchasing systems:

- a. Central Purchase Order System
 - Expenditures greater than or equal to \$1,000
 - Expenditures less than \$1,000 where an encumbrance is required
- b. Purchasing Card System
 - Expenditures less than \$1,000 where encumbrance is not required
- c. Direct Purchasing System
 - Expenditures less than \$1,000 where encumbrance is not required
- d. Purchase by formal tender process (e.g., RFP, RFQ or RFEI)
 - Expenditures \$75,000 or greater. Please note: It is encouraged to consider potential benefits of using a formal tender process for purchases of goods and services below the required threshold, where appropriate.
- e. Direct Award
 - A contract may be awarded without competitive bidding where one of the following conditions are met:
 - i. The contract is with another government organization
 - ii. There is proof that only one vendor is qualified, or available
 - iii. An unforeseen emergency exists
 - iv. A shared service pricing agreement is available.

The exceptions are travel expense claims as defined in Policy 3.2.5 *Travel and Expense Claims* and expenses related to services covered by legally binding contracts authorized as per the College's Signing Authority Matrix as defined in Policy 3.4.3 *Legal Signing Authority*.

PURCHASING RESPONSIBILITIES

The Budget Officer shall:

- a. be responsible for adhering to the ethical criteria of purchasing for a publicly funded institution and for ensuring that only appropriate and approved purchases are made.
- b. be responsible for all follow-ups relating to purchases through direct purchase and purchasing card systems, including confirmation of the receipt of goods and services, damages or shortages, returns, back orders, and price variances.

Any individual who obligates the College without authorization per these procedures may be held personally responsible for the commitment.

The Purchasing Agent shall:

- a. in consultation with the using Department, determine purchasing source/supply/service, based on quality, acceptable alternatives, price, source of supply, etc.
- b. maintain all purchasing records including but not limited to competitive pricing lists, approved vendors, quotations, bids, tendering process documents, specifications, etc.

BC Freedom of Information & Protection of Privacy Act

Information obtained as part of the purchasing/tendering processes (including technical data, prices, and specifications) shall be kept confidential. Requests for information from external parties shall be in writing and processed through the FOI Coordinator in accordance with the Act.

GUIDELINES

A. Central Purchase Order System (See process outline – Appendix A)

- A.1 The **Central Purchase Order System** shall be used for purchases as follows:
- a) Expenditures greater than or equal to \$1,000.00;
 - i. Orders having an estimated value of under \$5,000.00:
 - One to three quotes will normally be obtained at the discretion of the Purchasing Agent using an informal process prior to issuing the Purchase Order. Suppliers meeting the expected standard of quality and offering the best price and delivery will be awarded orders directly.
 - ii. Orders having an estimated value of \$5,000 to \$24,999:
 - Verbal or written prices will normally be obtained by the Purchasing Agent from up to three suppliers prior to issuing the Purchase Order. Written offers will normally be obtained when alternative products are considered and/or when product or service suppliers enable competition from a number of potential suppliers.
 - iii. Orders having an estimated value of \$25,000 to \$74,999:

- Written offers will normally be obtained by the Purchasing Agent from up to three suppliers before a Purchase Order is issued.
- iv. Where there is only a sole source of supply or when no alternate products or supplies may be considered, a Purchase Order will be issued only upon receipt of firm prices and delivery information.
- b) Expenditures less than \$1,000, but where encumbrance is to be recorded.

A.2 Blanket Purchase Orders

A limited number of cases exist where the College requires purchases on a repetitive routine basis from a single provider for a set period of time within one fiscal year. In these situations, and in consultation with the Purchasing Agent, a standing Blanket Purchase Order may be issued to the supplier with a specific expiration date within the same fiscal year and an expected maximum dollar amount (not to exceed \$5,000), clearly shown on the face of the Blanket Purchase Order.

B. Purchasing Card System (See process outline – Appendix B)

- B.1 The Purchasing Card System may be used for purchases as follows:
- i. Expenditures less than \$1,000 (exceptions may be approved by the Vice President Finance & Corporate Services) where encumbrance is not recorded.
 - ii. Each Purchasing Card will normally be set up to have an overall monthly limit of \$5,000. The Vice President Finance & Corporate Services may approve application for exceptions.
 - iii. Domestic and International travel expenses for members of the President’s Council and International travel expenses for all other College cardholders.

C. Direct Purchase System Process (See process outline – Appendix D)

- C.1 The Direct Purchase System may be used for purchases as follows:
- a. Expenditures that are less than \$1,000 where the designated signing authority does not consider the recording of an encumbrance necessary.

D. Formal Tender Process (See process outline – Appendix E)

- D.1 The formal purchase tendering process will normally be used for the purchase of goods and services that are \$75,000 or more (\$200,000 for construction contracts and capital). The process will be in compliance with the New West Partnership Trade Agreement requirements in that the procurement process:
- i. be non-discriminatory (i.e., opportunities shall be open to all suppliers regardless of province or geographical location)
 - ii. be open and fair
 - iii. advertise tendering opportunities nationally (BC Bid website is an acceptable vehicle for this purpose).

Central Purchase Order System Process

(Note: Section E applies to Bookstore/LRC acquisitions)

A. Process

1. The "Requisitioner" shall obtain pricing for item(s) working with the Purchasing Agent.
2. Once the supplier is chosen and pricing is determined, the "Requisitioner" will initiate an on-line requisition for approval from the appropriate Budget Officer.
3. Upon approval from the Budget Officer, the Purchasing Agent will review the requisition and create a purchase order. The purchase order will then be emailed to the vendor and copied to the "Requisitioner".

B. Purchase Order Responsibilities

The budget officer responsible for the purchase of goods and services shall ensure that required information shall be entered fully and correctly on the on-line requisition. As the Purchase Order forms a contract between the College and the supplier, the Purchasing Agent will ensure that the completed Purchase Order meets these criteria.

The Accounts Payable Department will use an acceptable variance of \$50.00 when paying actual invoices and will forward any invoice that exceeds the total Purchase Order amount by more than \$50.00 to the designated budget officer for signature.

The initiating department shall check off packing slips, initial that goods have been received in good form, date and forward it to Accounts Payable. Any invoices attached to the goods shall also be forwarded to the Financial Services Department to ensure prompt payment.

The initiator shall advise the Purchasing Agent of all follow-ups relating to purchases, including incorrectly filled orders, damages or shortages. Purchasing shall take necessary corrective or follow-up action on outstanding issues.

C. Purchase Order Distribution

The Purchasing Agent shall forward the approved Purchase Order to the appropriate vendor. There will be no paper copy of the Purchase Order within the College, but the detailed information will be available to all designated signing authorities and requisition initiators through the Colleague system.

D. Cancellation

Should a Purchase Order require cancellation, the designated budget officer shall send a message to the Purchasing Agent requesting cancellation.

E. Bookstore Inventory / Learning Resource Centre Library Acquisitions Purchasing System Process:

The Bookstore and the Learning Resource areas will create on-line Purchase Orders from approved written requests for books and other resource materials, completed by a budget officer.

The Bookstore shall create on-line Purchase Orders for the purchase of other Bookstore retail inventory. Purchase of supplies will be based on costs, availability and resale values.

Purchasing Card System Process

A. Process

1. The budget officer shall complete and submit an application (Appendix C) for issuance of a Purchasing Card to the Vice President Finance & Corporate Services for approval.

B. Purchasing Card Responsibility

1. The Purchasing Agent, upon request, will provide a list of Suggested Vendors to any cardholder.

Each cardholder will be responsible to ensure that:

- i. purchase receipts are attached to the College's copy of the purchasing card slip; and
- ii. proof of on-line orders are coded and signed by the appropriate budget officer.
- iii. receipts and slips are kept by the cardholder and forwarded to the Purchasing Agent on a specified day of each month to allow correct coding and prompt payment of the purchasing card invoice.

The cardholder will have the option of allowing staff in their area to use the card, but it will be the cardholder's ultimate responsibility to ensure that only appropriate College purchases are made with the card.

Purchasing Card activities shall be subject to a quarterly audit and the card may be recalled/cancelled by the budget officer, or by the Vice President Finance & Corporate Services, based on noncompliance with these procedures.



APPLICATION FOR PURCHASING CARD

Date: _____

Name of applicant: _____ Position/Title: _____

The Purchasing Cards will be set up to normally have an overall monthly limit of \$5,000. If you feel that your area will need a different overall monthly limit, please attach an explanation indicating what limit would be more appropriate.

Intended use of Purchasing Card:

College Policy & Procedures Manual

B. Purchasing Card System

- B.1 The Purchasing Card System may be used to purchase goods and services as follows:
 - i. Expenditures less than \$1,000 (exceptions may be approved by the Vice President Finance & Corporate Services) where encumbrance is not recorded.
 - ii. Domestic and International travel expenses for members of the President’s Council and International travel expenses for all other College cardholders.

I understand that as the official card holder, I have the option of allowing other College employees to use the card, but the ultimate responsibility for purchases made with the card will remain with me. I understand that the types of purchases made with the card must meet the criteria as set out in the College Procedures Manual Article 3.2.2 Coordinated Purchasing System (see above). I understand that I will be responsible to code, sign and forward all purchase receipts with attached purchasing card slips to the Purchasing Agent on a specified day each month. I further understand that any benefits derived from using this Purchasing Card are the property of the College of the Rockies.

I have read and understand Policy 3.2.2 Coordinated Purchasing System.

Signature of Applicant

Signature of Manager

Approved – VP-Finance & Corporate Services

Date

<p>For Purchasing Department use only:</p> <p>Purchasing Card Number:</p>
--

Direct Purchase System Process

A. Process

1. The budget officer shall have the option of allowing staff in their area to make direct purchases.
2. The employee making the purchase shall obtain signing authority approval prior to each purchase.
3. The employee making the purchase shall ensure that all original invoices/receipts list items purchased and bear the name of the employee making the purchase. The employee making the purchase shall submit such original invoices/receipts to the signing authority.
4. Upon receipt of goods or services, the signing authority shall correctly code and sign each purchase receipt or invoice and shall submit it to Financial Services for reimbursement through either Petty Cash (less than \$50) or on a completed cheque requisition to be process through the regular weekly cheque run (greater than \$50). Employees have the choice to sign-up for the direct deposit option through the Finance office for reimbursements issued through Accounts Payable.

Roles and Responsibilities for the Formal Purchase Tendering Process

A. Process

1. The Competitive Tendering process is as follows:
 - 1.1 Goods, Services and Construction contracts may be posted to BC Bid or directed to three or more vendors if the contract value is lower than the BC Bid requirement.
 - 1.2 Goods and Services must be posted on BC Bid (with RFP) if the value of the contract is estimated at \$75,000 or more, unless it is restricted to a pre-qualification list.
 - 1.3 Construction contracts valued at \$200,000 and over must be posted on BC Bid (with RFP if applicable) unless it is restricted to a pre-qualification list.
 - 1.4 Use of Formal Purchase Tendering Process Templates:
 - a. **Short-Form Request for Proposal (SRFP)** is used for contracts valued at \$250,000 or less primarily for acquiring services where price is not the only consideration in selecting a contractor (i.e., General Service Agreement is awarded to the proponent that is determined to offer the best overall value in meeting all mandatory requirements and scores the highest). (Appendix E-1)
 - b. **Long-Form Request for Proposal (LRFP)** is used for most IT contracts, contracts valued at greater than \$250,000 and contracts that may require the inclusion of a specialized insurance clause (Appendix E-2). It is used primarily for acquiring services where price is not the only consideration in selecting a contractor (i.e., General Service Agreement is awarded to the proponent that is determined to offer the best overall value in meeting all mandatory requirements and scores the highest).
 - c. **Invitation to Quote for Services (ITQS) Process** is used to acquire services when price is the only deciding factor (i.e., lowest price that meets specifications is awarded the contract in the form of a General Services Agreement with the exception of construction contracts that may require a specific type of contract e.g. a CCDC document) (Appendix E-3).
 - d. **Invitation to Quote for Goods (ITQG) Process** is used to acquire goods where price is the only deciding factor (i.e., lowest price bid that meets all mandatory requirements and specifications will be awarded the Purchase Order) (Appendix E-4).
 - e. **Request for Expression of Interest (RFEI) Process** is used to determine the market interest in a competitive solicitation process for goods, services and construction (i.e., determining how many vendors would be interested in competing on the opportunity). There is no evaluation, ranking or selection of vendors and it is not used to pre-qualify or screen vendors for a subsequent competitive bidding process (Appendix E-5).
 - f. **Request for Qualifications (RFQ) Process** is used to create a pre-qualification list of vendors who are then eligible to participate in a subsequent Request for Proposal process. RFQ's are used when:
 - i. vendors must demonstrate that their products or services meet defined performance standards and specifications as a pre-condition to a solicitation
 - ii. if the College anticipates multiple, similar acquisitions over a defined period of time and vendors would otherwise be required to submit the same detailed qualifications each time
 - iii. purchasing a single, complex, high value set of services where the solicitation will only be issued to a short list of vendors meeting a defined standard of qualifications (Appendix E-6).

Responsibilities (next page)

B. Responsibilities

1. Operational Manager

- i. Enters content into the tender template including the development of the evaluation criteria, when required (and then forwards to the Contract and Risk Management Advisor for review)
- ii. Contact person in tender document/proposal for questions
- iii. Holds the proponent's site tour/meeting
- iv. Determines the members of the Evaluation/Selection Committee (minimum of three members) and holds a Committee meeting to review qualified proposals
- v. Conducts proposal interviews (if required)
- vi. Notifies the successful proponent and signs the General Service Agreement (when required) in accordance with the College's Signing Authority Matrix and process requirements
- vii. Notifies the unsuccessful proponents
- viii. Ensures summary of evaluation of tenders is held for a minimum of the term of the contract or 12 months, whichever is longer.

2. Purchasing Agent

- i. Issues tender/proposal document (distribution determined on a case-by-case basis)
- ii. Receives confidential tender/proposal submissions and forwards to the Operation Manager.
- iii. Ensures all tender/proposal submission requirements have been met (e.g., to be considered, must be received by a specific closing date/time)
- iv. Screens tenders/proposals received by closing date/time for Mandatory Criteria (e.g., identified qualifications and minimum years of experience) and forwards those that meet the Mandatory Criteria to the Operational Manager to be reviewed at the Evaluation/Selection Committee meeting.

3. Contract and Risk Management Advisor

- i. Reviews tender template content prepared by the Operational Manager
- ii. Reviews any Additional Terms and Conditions of the tender document/proposal.
- v. Ensures the compliance requirements have been met in the General Service Agreement, when required, prior to signatures

SHORT FORM RFP –\$250,000 and under (and not for IT use)

RFP AUTHOR: Red are instructions to be deleted before finalizing. Yellow is to be filled-in or changed by you. Blue are alternate choices/options.



REQUEST FOR PROPOSALS

Date:

Project Title:

1. BACKGROUND & PURPOSE

[Author: Provide information regarding the College that is relative to the service/good needed and identify the service/good that is needed (more details required later)]

Example: The College of the Rockies (“College”) has received a grant through XYZ Proposal funding to support the implementation of a pilot to develop a second year X course designed using X principles. The College requires a consultant with expertise in X design for learning in the context of post-secondary education. The College is seeking a qualified Consultant in X design for learning to help guide us through the project.

2. KEY DATES & DEADLINES

In order to assist Proponents, the following are the anticipated dates with respect to this RFP process. Such dates are not guaranteed and may change based upon circumstances. All times is Cranbrook, B.C. local time.

Activities	Time & Date
1. RFP Issued	
2. Closing Date for Submission	
3. Evaluation and Award (if any)	

3. GENERAL INFORMATION & INSTRUCTIONS

3.1 COLLEGE CONTACT FOR ENQUIRIES

All enquiries related to this Request for Proposals (RFP), including any requests for information and clarification, are to be directed, in writing, to the following person who will respond if time permits:

Operational Manager’s Name

College of the Rockies

Address:

Tel: Fax:

Email:

Information obtained from any other source is not official and should not be relied upon. Enquiries and any responses will be recorded and may be distributed to all Proponents at the College's option.

3.2 PROPONENT'S MEETING: [Author: choose one option and delete the other]

Option A: A Proponents' meeting **will** be held at: *(Insert Date and Time), (Insert Address Line1)*

Note: Attendance is optional. Oral questions will be allowed at the Proponents' meeting.

However, questions of a complex nature, or questions where the Proponent requires anonymity, should be forwarded in writing, prior to the meeting, to the College's Contact person designated above.

OR

Option B: A Proponents' meeting **will not** be held.

3.3 PROPONENT'S COSTS

All costs and expenses with respect to the preparation and submission of a response pursuant to this RFP, and in attending the Proponent's Meeting at the College, if any, shall be the sole responsibility of the Proponent and the College assumes no liability whatsoever for any Proponent's costs and expenses.

3.4 FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT

All documents, including Responses, submitted to the College are governed by the access and privacy provisions of the *Freedom of Information and Protection of Privacy Act*, R.S.B.C. 1996 c.165 (FIPPA) and will become the property of the College and will not be returned. Responses are received and held in confidence by the College subject to disclosure required by law. Proponents shall clearly identify any specific information and/or records that it provides in its Response that:

- constitute a trade secret;
- is supplied in confidence; and,
- the release of which could significantly harm its competitive position.

A general declaration may be insufficient and disregarded. In responding to a FIPPA access request, the College may be required to release information and/or records that do not meet all three of the above requirements. Proponents agree to hold the College harmless against any claims and any damages for release of any information and/or records by the College in response to a FIPPA access request.

3.5 DEFINITIONS & ADMINISTRATIVE REQUIREMENTS

Please refer to Appendix A for the Definitions and Administrative Requirements that apply to this RFP. By submitting a proposal to this RFP, the Proponent agrees to be bound by these requirements.

4. REQUIREMENTS

SECTION 1. DETAILED DELIVERABLES

[Author: Provide details about the service/good that is needed]

Example: The successful candidate will have a minimum of a X degree in Y or a related area and a strong knowledge of and ability to apply Z principles to curriculum design at the postsecondary level. Additionally, candidates should have previous consulting experience. Experience working with adult learners in a post-secondary environment and familiarity with best practices in adult learning is an asset.

Responsibilities:

- Provide project management support;
- Work with faculty to design curriculum;
- Provide recommendations for educational technology;
- Design surveys to assess course outcomes;
- Assist in the creation of a toolkit for other faculty interested in implementing principles when creating or renewing their curriculum; and
- Host learning seminars to inform all areas of the College.

SECTION 2. DISCLOSURES

[Author: Details of factors that should be considered by the proponents in their response should be included here. Factors that would potentially impact the ability of the vendor to deliver should be identified. Examples include: limited access, dependency upon other projects, scheduling issues, liability insurance, etc.]

Example: The College operates within a unionized environment. The Consultant will be working closely with name/title, and is expected to be available to work between *GSA TERM DATES 2017*.

Below are the Project's milestones and status:

Task	Status	Date
Redesigning lecture and text materials using the frame work described	Complete & pending advisory input.	
Creating print material	In progress.	
Taping and transcribing lectures		
Implementing a X course		
Project Target Completion		

SECTION 3. PROPOSAL SUBMISSION REQUIREMENTS

In order to be considered, Proponents must submit their responses prior to the closing date noted in section 2. Key Dates & Deadlines. Proponents should submit their responses in a format that addresses the requirements under the section titles as identified in the table below. **SUBMISSIONS WILL NOT BE CONSIDERED IF THEY FAIL TO SUBMIT A SECTION IDENTIFIED AS A MANDATORY COMPLIANCE ITEM.**

[Author: Modify the sample table below as needed. Identify the qualifications that the respondents should demonstrate in their proposal. Compliance should be identified as mandatory if they are **ABSOLUTELY** required (**A CANDIDATE CAN NOT BE CONSIDERED IF THEY FAIL TO MEET MANDATORY REQUIREMENTS**). All other requirements are preferred requirements. Preferred requirements should list items that the proponents could demonstrate in their proposal.]

Section Title	Requirements	Compliance
Schedule A - Confirmation of Offer	Proponents *must* complete and sign Schedule A. Failure to do so will result in non-compliance of your response.	MANDATORY
Qualifications	Proponents must submit a resume with sufficient information to allow a meaningful assessment of their experience and expertise, and provide examples where appropriate, to demonstrate experience in: extensive experience implementing and developing curriculum implementing; and managing the project.	MANDATORY
References	Supply a minimum of two (2) clients/companies, and appropriate and current contact references. Please include description of the services provided. Please indicate if the College can contact your reference.	MANDATORY
Consultant Statement	Proponents must provide information explaining if they consider themselves an independent Consultant under CRA.	MANDATORY
Schedule B – Financial Response	Proponents must provide a completed Schedule B.	MANDATORY
Table of Contents	The Table of Contents should include the Section titles and corresponding page numbers.	PREFERRED
Executive Summary	Provide a brief profile of your company indicating industry experience (1000 words maximum)	PREFERRED
Account Management & Service	Describe in your Response your approach to enable efficient and effective contract management for the duration of any agreement, including: <ul style="list-style-type: none"> Contract relationship management framework Describe in detail any Key Performance Indicators (KPI's) currently in place within your organization to measure performance. Indicate key personnel, and their experience, that would be assigned to and work directly with the College. 	PREFERRED
Value Added Services	Detail any value added services that your firm can provide that may complement or enhance our requirements.	PREFERRED

SECTION 4. RESPONSE SUBMISSION

Proponents should submit in a form as indicated in 4. Requirements, Section 3 Proposal Submission Requirements: [Author: choose one instruction and delete the other or keep A and B if both will be used] **Proposals must not be sent by mail, facsimile or e-mail.** Proposals are to be submitted to the closing location as follows:

Option A. (Insert Number) complete hard-copies (and x copy(s) on CD, DVD or USB media) must be delivered by hand or courier to: Attention: Tracy Doyle, Purchasing Agent

College of the Rockies
2700 College Way, Box 8500,
Cranbrook B.C., V1C 5L7

Proposal envelopes should be clearly marked with the name and address of the Proponent and the project or program title.

OR

Option B. One complete electronic proposal must be received in accordance with BC Bid instructions for e-bidding. Only pre-authorized e-bidders registered on the BC Bid system can submit electronic bids.

SECTION 5. EVALUATION CRITERIA

Responses will be evaluated against the Submission Requirements. The evaluations will be weighted as follows: [Author: In deciding on the following criteria, consider the Scope of Work required]

Criteria	Weighting
Qualifications	50%
References	20%
Financial Response	30%

The College reserves the right, in its sole discretion to clarify any Response without becoming obligated to offer the same opportunity to any other Proponent(s). The College, as a result of this RFP process, has no obligation to establish a shortlist of Proponents and reserves the right to reject any and all submissions.

SECTION 6. AWARD

The highest ranked Proponent will be invited to negotiate a contract with the College based upon the submitted proposal. Should a contract not be negotiated within fifteen (15) Business Days from the invitation to negotiate, the College may elect to terminate negotiations; proceed to negotiations with the next highest ranked bidder; or withdraw the solicitation.

SCHEDULE A – CONFIRMATION OF OFFER

Company/Individual Name:
Signature:
Name:
Title:
Address:
Email:
Telephone:
Date:
If the Proponent is a company, your signature above confirms you have the legal authority to bind the Proponent.

Where applicable, Partner Proponent signature required below:
Company Name:
Signature:
Name:
Title:
Date:
If the Partner Proponent is a company, your signature above confirms you have the legal authority to bind the Partner Proponent.

Addenda:
Signature(s) above acknowledges receipt and inclusion of all addenda to the RFP documents up to and including the following addenda;
Addendum No. _____ dated _____, 20__ __ pages

SCHEDULE B - FINANCIAL RESPONSE

Fees should be provided in Canadian Dollars, before taxes.

Rate Structure	Cost	Per
Rate		
Travel Cost		
Disbursement		
Any other information on rates, pricing or assumptions the Proponent deems appropriate		

APPENDIX A. DEFINITIONS AND ADMINISTRATIVE REQUIREMENTS

1. Definitions

Throughout this Request for Proposals, the following definitions applied:

- a) "Contract" means the written agreement resulting from this Request for Proposals executed by the College and the Contractor;
- b) "Contractor" means the successful Proponent to this Request for Proposals who enters into a written Contract with the College;
- c) "College" means College of the Rockies;
- d) "must", or "mandatory" means a requirement that must be met in order for a proposal to receive consideration;
- e) "Proponent" means an individual or a company that submits, or intends to submit, a proposal in response to this Request for Proposals;
- f) "Request for Proposals" or "RFP" means the process described in this document; and
- g) "should" or "desirable" means a requirement having a significant degree of importance to the objectives of the Request for Proposals.

2. Terms and Conditions

The following terms and conditions will apply to this Request for Proposals. Submission of a proposal in response to this Request for Proposals indicates acceptance of all the terms that follow and that are included in any addenda issued by the College. Provisions in proposals that contradict any of the terms of this Request for Proposals will be as if not written and do not exist.

3. Late Proposals

Proposals will be marked with their receipt time at the closing location. Only complete proposals received and marked before closing time will be considered to have been received on time. Hard-copies of late proposals will not be accepted and will be returned to the Proponent. Electronic proposals that are received late will be marked late and will not be considered or evaluated.

In the event of a dispute, the proposal receipt time as recorded at the closing location shall prevail whether accurate or not.

4. Eligibility

- a) Proposals will not be evaluated if the Proponent's current or past corporate or other interests may, in the College's opinion, give rise to a conflict of interest in connection with the project described in this Request for Proposals. This includes, but is not limited to, involvement by a Proponent in the preparation of this Request for Proposals. If a Proponent is in doubt as to whether there might be a conflict of interest, the Proponent should consult with the College's Contact Person listed on page 1 prior to submitting a proposal.
- b) Proposals from not-for-profit agencies will be evaluated against the same criteria as those received from any other Proponents.

5. Evaluation

Evaluation of proposals will be by a committee formed by the College and may include employees and contractors of the College. All personnel will be bound by the same standards of

confidentiality. The College's intent is to enter into a Contract with the Proponent who has the highest overall ranking.

6. Negotiation Delay

If a written Contract cannot be negotiated within thirty days of notification of the successful Proponent, the College may, at its sole discretion at any time thereafter, terminate negotiations with that Proponent and either negotiate a Contract with the next qualified Proponent or choose to terminate the Request for Proposals process and not enter into a Contract with any of the Proponents.

7. Debriefing

At the conclusion of the Request for Proposals process, all Proponents will be notified. Unsuccessful Proponents may request a debriefing meeting with the College.

8. Alternative Solutions

If alternative solutions are offered, please submit the information in the same format, as a separate proposal.

9. Changes to Proposals

By submission of a clear and detailed written notice, the Proponent may amend or withdraw its proposal prior to the closing date and time. Upon closing time, all proposals become irrevocable. The Proponent will not change the wording of its proposal after closing and no words or comments will be added to the proposal unless requested by the College for purposes of clarification.

10. Proponents' Expenses

Proponents are solely responsible for their own expenses in preparing a proposal and for subsequent negotiations with the College, if any. If the College elects to reject all proposals, the College will not be liable to any Proponent for any claims, whether for costs or damages incurred by the Proponent in preparing the proposal, loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

11. Limitation of Damages

Further to the preceding paragraph, the Proponent, by submitting a proposal, agrees that it will not claim damages, for whatever reason, relating to the Contract or in respect of the competitive process, in excess of an amount equivalent to the reasonable costs incurred by the Proponent in preparing its proposal and the Proponent, by submitting a proposal, waives any claim for loss of profits if no Contract is made with the Proponent.

12. Proposal Validity

Proposals will be open for acceptance for at least 90 days after the closing date.

13. Firm Pricing

Prices will be firm for the entire Contract period unless this Request for Proposals specifically states otherwise.

14. Currency and Taxes

Prices quoted are to be:

- a) in Canadian dollars;
- b) inclusive of duty, where applicable; FOB destination, delivery charges included where applicable; and
- c) exclusive of applicable taxes.

15. Completeness of Proposal

By submission of a proposal the Proponent warrants that, if this Request for Proposals is to design, create or provide a system or manage a program, all components required to run the system or manage the program have been identified in the proposal or will be provided by the Contractor at no charge.

16. Sub-Contracting

- a) Using a sub-contractor (who should be clearly identified in the proposal) must be approved by the College. This includes a joint submission by two Proponents having no formal corporate links. However, in this case, one of these Proponents must be prepared to take overall responsibility for successful performance of the Contract and this should be clearly defined in the proposal.
- b) Sub-contracting to any firm or individual whose current or past corporate or other interests may, in the College's opinion, give rise to a conflict of interest in connection with the project or program described in this Request for Proposals will not be permitted. This includes, but is not limited to, any firm or individual involved in the preparation of this Request for Proposals. If a Proponent is in doubt as to whether a proposed subcontractor gives rise to a conflict of interest, the Proponent should consult with the College's Contact Person listed on page 1 prior to submitting a proposal.
- c) Where applicable, the names of approved sub-contractors listed in the proposal will be included in the Contract. No additional subcontractors will be added, nor other changes made, to this list in the Contract without the written consent of the College.

17. Acceptance of Proposals

- a) This Request for Proposals should not be construed as an agreement to purchase goods or services. The College is not bound to enter into a Contract with the Proponent who submits the lowest priced proposal or with any Proponent. Proposals will be assessed in light of the evaluation criteria. The College will be under no obligation to receive further information, whether written or oral, from any Proponent.
- b) Neither acceptance of a proposal nor execution of a Contract will constitute approval of any activity or development contemplated in any proposal that requires any approval, permit or license pursuant to any federal, provincial, regional district or municipal statute, regulation or by-law.

18. Definition of Contract

Notice in writing to a Proponent that it has been identified as the successful Proponent and the subsequent full execution of a written Contract will constitute a Contract for the goods or services, and no Proponent will acquire any legal or equitable rights or privileges relative to the goods or services until the occurrence of both such events.

19. Contract

By submission of a proposal, the Proponent agrees that should its proposal be successful the Proponent will enter into a Contract with The College in the terms set out in Appendix B.

20. Liability for Errors

While the College has used considerable efforts to ensure information in this Request for Proposals is accurate, the information contained in this Request for Proposals is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the College, nor is it necessarily comprehensive or exhaustive. Nothing in this Request for Proposals is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in this Request for Proposals.

21. Modification of Terms

The College reserves the right to modify the terms of this Request for Proposals at any time in its sole discretion. This includes the right to cancel this Request for Proposals at any time prior to entering into a Contract with the successful Proponent.

22. Ownership of Proposals

All proposals submitted to the College become the property of the College. They will be received and held in confidence by the College, subject to the provisions of the *Freedom of Information and Protection of Privacy Act* and this Request for Proposals.

23. Use of Request for Proposals

Any portion of this document, or any information supplied by the College in relation to this Request for Proposals may not be used or disclosed, for any purpose other than for the submission of proposals. Without limiting the generality of the foregoing, by submission of a proposal, the Proponent agrees to hold in confidence all information supplied by the College in relation to this Request for Proposals.

24. Reciprocity

The College will consider and evaluate any proposals in compliance with the New West Partnership Trade Agreement.

25. No Lobbying

Proponents must not attempt to communicate directly or indirectly with any employee, contractor or representative of the College, including the evaluation committee and any elected officials of the College, or with members of the public or the media, about the project described in this Request for Proposals or otherwise in respect of the Request for Proposals, other than as expressly directed or permitted by the College.

26. Collection and Use of Personal Information

Proponents are solely responsible for familiarizing themselves, and ensuring that they comply, with the laws applicable to the collection and dissemination of information, including resumes and other personal information concerning employees and employees of any subcontractors. If this RFP requires Proponents to provide the College with personal information of employees who have been included as resources in response to this RFP, Proponents will ensure that they have obtained written consent from each of those employees before forwarding such personal information to the College. Such written consents are to specify that the personal information may be forwarded to the College for the purposes of responding to this RFP and use by the College for the purposes set out in the RFP. The College may, at any time, request the original consents or copies of the original consents from Proponents, and upon such request being made, Proponents will immediately supply such originals or copies to the College.

APPENDIX B - CONTRACT FORM

By submission of a proposal, the Proponent agrees that should its proposal be successful the Proponent will enter into a Contract with the College in accordance with the terms of the following draft General Service Agreement and attached Schedules.

[Author: Attach College of the Rockies General Service Agreement and the applicable schedules]

PROPOSER NAME

EVALUATORS:

Number	EVALUATION CRITERIA	EVALUATORS:			COMMENTS / RATIONALE FOR SCORE
		Criteria Addressed	Available Points	Weighted Score	
1 MANDATORY CRITERIA					
a)	The proposal must be in English.				
b)	The proposal must comply with the delivery requirements set out in the SRFP.				
c)	The proposal must be signed by an authorized representative of the Proponent or by using the e-bidding key on BC Bid (if electronic submissions are permitted).				
d)	The proposal must be submitted using the SRFP Proposal Form.				
e)					
	Passed All Mandatories (Yes / No)				
<p>NOTES FOR USING THIS EVALUATION HANDBOOK</p> <p>The Evaluation team may award points for related, valuable information provided in the proposal that is not included in the criteria below. Evaluators may also award partial points (i.e. 1/2) if a criterion is mentioned or additional related and valuable information is included, but details are lacking for the evaluators to understand what is being offered.</p> <p>In all cases, Evaluators are expected to insert a "1" in column D for those criteria that are fully met in the proposal, and to include comments to support how it is met if this is not obvious. Comments are also expected where only 1/2 points are given explaining the rationale for the award, and to fully describe any points given for additional information not included in the criteria.</p>					
2 PROPOSED SUB-CONTRACTORS					
	In the Comments column, indicate the proposed sub-contractors. If sub-contractors will be used, insert "none". If sub-contractors will be used but were not named, specify this.				Not evaluated.
3 EXECUTIVE SUMMARY					
	Provide an Executive Summary of the key points of this proposal.				Not evaluated in this section. However, any information relevant to other sections of the SRFP can be considered.
4 PROPONENT EXPERIENCE					
	Provide two to four examples of projects that the Proponent and/or proposed subcontractor(s) have completed within the past three years (as of the closing date of the SRFP) and include all the information requested below.				
a)					

PROPONENT NAME

EVALUATORS:

Number	EVALUATION CRITERIA	EVALUATORS:			COMMENTS / RATIONALE FOR SCORE
		Criteria Addressed	Available Points	Weighted Score	
	SCORE:	0		0	
b)					
	SCORE:	0		0	
c)					
	SCORE:	0		0	
d)					

PROPONENT NAME

EVALUATORS:

Number	EVALUATION CRITERIA	Criteria Addressed	Available Points	Weighted Score	COMMENTS / RATIONALE FOR SCORE
	SCORE:	0	0	0	
e)					
	SCORE:	0	0	0	
Total Score: Proponent Experience		0	0	0	
5 APPROACH					
	<p>In the space below, propose an approach that addresses the requirements in section 5 above. Include any additional processes in your approach that may improve quality, increase efficiency, and/or otherwise benefit the College that are included in the price proposed, explaining why such processes are recommended.</p>				
	<p><i>Proposed Approach will likely improve quality (explain how in the Comments section)</i></p>				
	<p><i>Proposed Approach will likely increase efficiency (explain how in the Comments section)</i></p>				
	<p><i>Proposed Approach has another benefit to the College (explain what in the Comments section)</i></p>				
	SCORE:	0	0	0	
Total Score: Approach		0	0	0	
6 PRICE					
	OPTION #1: Provide a single proposed price, as described above. Do not include GST or PST (if applicable) in this price.				

PROPONENT NAME

EVALUATORS:

Number	EVALUATION CRITERIA	Criteria Addressed	Available Points	Weighted Score	COMMENTS / RATIONALE FOR SCORE
	<i>Insert price proposed in the Comments Section</i>				
	SCORE:				
	OPTION #2: Complete the following table. Do not include GST or PST (if applicable) in the prices proposed.				
	<i>Insert price proposed for price #1</i>				
	<i>Insert price proposed for price #2</i>				
	<i>Insert price proposed for price #3</i>				
	<i>Insert price proposed for price #4</i>				
	TOTAL PRICE FOR EVALUATING THIS PROPOSAL:				
	SCORE:				
	Total Score: Price		0	0	
TOTAL SCORE FOR PROPONENT					
	Total Score for Proponent		0	0	



Request for Proposals

Project Title

Issue date:

Closing time: Proposal must be received before 2:00 PM Mountain Time on: **Insert Date**

College of the Rockies Contact: All enquiries related to this Request for Proposals (RFP), including any requests for information and clarification, are to be directed, in writing, to the following person who will respond if time permits. Information obtained from any other source is not official and should not be relied upon. Enquiries and any responses will be recorded and may be distributed to all Proponents at the College of the Rockies option.

Operational Manager’s name, Title, Address, Fax: Email:

Delivery of Proposals: (Author: choose one instruction and delete the other or keep A and B if both will be used)

Proposals must not be sent by mail, facsimile or e-mail. Proposals are to be submitted to the closing location as follows:

- A. (Insert Number) complete hard-copies (and x copy(s) on CD, DVD or USB media) must be delivered by hand or courier to:
 - College of the Rockies
 - 2700 College Way, Box 8500,
 - Cranbrook B.C., V1C 5L7
 - Attention: Tracy Doyle, Purchasing Agent

Proposal envelopes should be clearly marked with the name and address of the Proponent, the Request for Proposals number, and the project or program title. **OR**

- B. One complete electronic proposal must be received in accordance with BC Bid instructions for e-bidding. Only pre-authorized e-bidders registered on the BC Bid system can submit electronic bids.

Proponent’s Meeting: (Author: choose one instruction and delete the other)

A Proponents’ meeting **will** be held at: (Insert Date and Time), (Insert Address Line1)

Note: Attendance is optional. Oral questions will be allowed at the Proponents’ meeting. However, questions of a complex nature, or questions where the Proponent requires anonymity, should be forwarded in writing, prior to the meeting, to the College’s Contact person designated above. **OR** A Proponents’ meeting **will not** be held.

PROPONENT SECTION:	
<p>For hard-copy proposals, a person authorized to sign on behalf of the Proponent must complete and sign the Proponent Section (below), leaving the rest of this page otherwise unaltered, and include the originally-signed and completed page with the first copy of the proposal. For electronic proposals, all parts of the Proponent Section (below) must be completed except the signature field, as the BC Bid e-bidding key is deemed to be an original signature. The rest of this page must be otherwise unaltered and submitted as part of your proposal. The enclosed proposal is submitted in response to the above-referenced Request for Proposals, including any addenda. Through submission of this proposal we agree to all of the terms and conditions of the Request for Proposals and agree that any inconsistent provisions in our proposal will be as if not written and do not exist. We have carefully read and examined the Request for Proposals, including the Administrative Section, and have conducted such other investigations as were prudent and reasonable in preparing the proposal. We agree to be bound by statements and representations made in our proposal.</p>	
Signature of Authorized Representative:	Legal Name of Proponent (and Doing Business As Name, if applicable):
Printed Name of Authorized Representative:	Address of Proponent:
Title:	
Date:	Authorized Representative phone, fax or email address (if available):

1 - RFP SUMMARY INFORMATION

1.1 BACKGROUND

[Provide information regarding the College that is relative to the service/good needed]

The College of the Rockies (“College”) has received a grant through...to support the implementation of a pilot project. The College requires a consultant with expertise in ...

1.2 PURPOSE

[Identify the service/good that is needed]

The College is seeking qualified Respondents via a negotiated Request for Proposal (RFP) to provide...

For more information, please refer to Appendix B – RFP Details.

The College makes no guarantees on future annual spend. The College cannot and will not make any firm financial commitments or volume guarantees.

Through this negotiated RFP, the College seeks to:

1. evaluate the qualifications of Respondents;
2. establish a financial schedule;
3. outline the negotiation process that would lead to terms and conditions that would govern any resulting contract;
4. select the successful Respondent(s), if any and
5. establish non-exclusive master agreements that will govern subsequent contracts with successful Respondent(s).

Services beyond the scope as outlined above may be required by the College. The College reserves the right to include any additional services. The College reserves at any time the right to prequalify other firms.

The initial contracts will be for *[Identify length of contract term]*

The College is requesting proposals only from individuals or firms who are qualified to undertake this work.

This RFP states the instructions for submitting Responses, and the procedure by which Respondents(s), if any, will be selected.

1.3 KEY DATES AND DEADLINES

Request for Proposals	Time and Date (Local Time)
1. RFP issued	
2. Inquiries received up to	
3. Closing Date for Submission of Responses	
4. Interview Short Listed Respondents (if required)	
5. Evaluation and Award (if any)	

A. DEFINITIONS AND ADMINISTRATIVE REQUIREMENTS

1. DEFINITIONS

Throughout this Request for Proposals, the following definitions apply:

- a. "Contract" means the written agreement resulting from this Request for Proposals executed by the College and the Contractor;
- b. "Contractor" means the successful Proponent to this Request for Proposals who enters into a written Contract with the College;
- c. "The College" means College of the Rockies;
- d. "must", or "mandatory" means a requirement that must be met in order for a proposal to receive consideration;
- e. "Proponent" means an individual or a company that submits, or intends to submit, a proposal in response to this Request for Proposals;
- f. "Request for Proposals" or "RFP" means the process described in this document; and
- g. "should" or "desirable" means a requirement having a significant degree of importance to the objectives of the Request for Proposals.

2. Terms and Conditions

The following terms and conditions will apply to this Request for Proposals. Submission of a proposal in response to this Request for Proposals indicates acceptance of all the terms that follow and that are included in any addenda issued by the College. Provisions in proposals that contradict any of the terms of this Request for Proposals will be as if not written and do not exist.

3. Additional Information Regarding the Request for Proposals

[Author: include this paragraph if using Receipt Confirmation Form for additional information OR for notification of Proponents Meeting] Proponents are advised to fill out and return the attached Receipt Confirmation Form.

AND/OR

[Author: include this paragraph if additional information will be posted only on BC Bid]

All subsequent information regarding this Request for Proposals, including changes made to this document will be posted on the BC Bid website at www.bcbid.ca. It is the sole responsibility of the Proponent to check for amendments on the BC Bid website.

4. Late Proposals

Proposals will be marked with their receipt time at the closing location. Only complete proposals received and marked before closing time will be considered to have been received on time. Hard-copies of late proposals will not be accepted and will be returned to the Proponent. Electronic proposals that are received late will be marked late and will not be considered or evaluated. In the event of a dispute, the proposal receipt time as recorded at the closing location shall prevail whether accurate or not.

5. Eligibility

- a. Proposals will not be evaluated if the Proponent's current or past corporate or other interests may, in the College's opinion, give rise to a conflict of interest in connection with the project described in this Request for Proposals. This includes, but is not limited to, involvement by a Proponent in

the preparation of this Request for Proposals. If a Proponent is in doubt as to whether there might be a conflict of interest, the Proponent should consult with the College's Contact Person listed on page 1 prior to submitting a proposal.

- b. Proposals from not-for-profit agencies will be evaluated against the same criteria as those received from any other Proponents.

6. Evaluation

Evaluation of proposals will be by a committee formed by the College and may include employees and contractors of the College. All personnel will be bound by the same standards of confidentiality. The College's intent is to enter into a Contract with the Proponent who has the highest overall ranking.

7. Negotiation Delay

If a written Contract cannot be negotiated within thirty days of notification of the successful Proponent, the College may, at its sole discretion at any time thereafter, terminate negotiations with that Proponent and either negotiate a Contract with the next qualified Proponent or choose to terminate the Request for Proposals process and not enter into a Contract with any of the Proponents.

8. Debriefing

At the conclusion of the Request for Proposals process, all Proponents will be notified. Unsuccessful Proponents may request a debriefing meeting with the College.

9. Alternative Solutions

If alternative solutions are offered, please submit the information in the same format, as a separate proposal.

10. Changes to Proposals

By submission of a clear and detailed written notice, the Proponent may amend or withdraw its proposal prior to the closing date and time. Upon closing time, all proposals become irrevocable. The Proponent will not change the wording of its proposal after closing and no words or comments will be added to the proposal unless requested by the College for purposes of clarification.

11. Proponents' Expenses

Proponents are solely responsible for their own expenses in preparing a proposal and for subsequent negotiations with the College, if any. If the College elects to reject all proposals, the College will not be liable to any Proponent for any claims, whether for costs or damages incurred by the Proponent in preparing the proposal, loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

12. Limitation of Damages

Further to the preceding paragraph, the Proponent, by submitting a proposal, agrees that it will not claim damages, for whatever reason, relating to the Contract or in respect of the competitive process, in excess of an amount equivalent to the reasonable costs incurred by the Proponent in preparing its proposal and the Proponent, by submitting a proposal, waives any claim for loss of profits if no Contract is made with the Proponent.

13. Proposal Validity

Proposals will be open for acceptance for at least 90 days after the closing date.

14. Firm Pricing

Prices will be firm for the entire Contract period unless this Request for Proposals specifically states otherwise.

15. Currency and Taxes

Prices quoted are to be:

- a. in Canadian dollars;
- b. inclusive of duty, where applicable; FOB destination, delivery charges included where applicable; and
- c. exclusive of applicable taxes.

16. Completeness of Proposal

By submission of a proposal the Proponent warrants that, if this Request for Proposals is to design, create or provide a system or manage a program, all components required to run the system or manage the program have been identified in the proposal or will be provided by the Contractor at no charge.

17. Sub-Contracting

- a. Using a sub-contractor (who should be clearly identified in the proposal) must be approved by the College. This includes a joint submission by two Proponents having no formal corporate links. However, in this case, one of these Proponents must be prepared to take overall responsibility for successful performance of the Contract and this should be clearly defined in the proposal.

Sub-contracting to any firm or individual whose current or past corporate or other interests may, in the College's opinion, give rise to a conflict of interest in connection with the project or program described in this Request for Proposals will not be permitted. This includes, but is not limited to, any firm or individual involved in the preparation of this Request for Proposals. If a Proponent is in doubt as to whether a proposed subcontractor gives rise to a conflict of interest, the Proponent should consult with the College's Contact Person listed on page 1 prior to submitting a proposal.

Where applicable, the names of approved sub-contractors listed in the proposal will be included in the Contract. No additional subcontractors will be added, nor other changes made, to this list in the Contract without the written consent of the College.

18. Acceptance of Proposals

- b. This Request for Proposals should not be construed as an agreement to purchase goods or services. The College is not bound to enter into a Contract with the Proponent who submits the lowest priced proposal or with any Proponent. Proposals will be assessed in light of the evaluation criteria. The College will be under no obligation to receive further information, whether written or oral, from any Proponent.
- c. Neither acceptance of a proposal nor execution of a Contract will constitute approval of any activity or development contemplated in any proposal that requires any approval, permit or license pursuant to any federal, provincial, regional district or municipal statute, regulation or by-law.

19. Definition of Contract

Notice in writing to a Proponent that it has been identified as the successful Proponent and the subsequent full execution of a written Contract will constitute a Contract for the goods or services, and no Proponent will acquire any legal or equitable

rights or privileges relative to the goods or services until the occurrence of both such events.

20. Contract

By submission of a proposal, the Proponent agrees that should its proposal be successful the Proponent will enter into a Contract with the College on the terms set out in Appendix B.

21. Liability for Errors

While the College has used considerable efforts to ensure information in this Request for Proposals is accurate, the information contained in this Request for Proposals is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the College, nor is it necessarily comprehensive or exhaustive. Nothing in this Request for Proposals is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in this Request for Proposals.

22. Modification of Terms

The College reserves the right to modify the terms of this Request for Proposals at any time in its sole discretion. This includes the right to cancel this Request for Proposals at any time prior to entering into a Contract with the successful Proponent.

23. Ownership of Proposals

All proposals submitted to the College become the property of the College. They will be received and held in confidence by the College, subject to the provisions of the *Freedom of Information and Protection of Privacy Act* and this Request for Proposals.

24. Use of Request for Proposals

Any portion of this document, or any information supplied by the College in relation to this Request for Proposals may not be used or disclosed, for any purpose other than for the submission of proposals. Without limiting the generality of the foregoing, by submission of a proposal, the Proponent agrees to hold in confidence all information supplied by the College in relation to this Request for Proposals.

25. Reciprocity

The College will consider and evaluate any proposals in compliance with the New West Partnership Trade Agreement.

26. No Lobbying

Proponents must not attempt to communicate directly or indirectly with any employee, contractor or representative of the College, including the evaluation committee and any elected officials of the College, or with members of the public or the media, about the project described in this Request for Proposals or otherwise in respect of the Request for Proposals, other than as expressly directed or permitted by the College.

27. Collection and Use of Personal Information

Proponents are solely responsible for familiarizing themselves, and ensuring that they comply, with the laws applicable to the collection and dissemination of information, including resumes and other personal information concerning employees and employees of any subcontractors. If this RFP requires Proponents to provide the College with personal information of employees who have been included as resources in response to this RFP, Proponents will ensure that they have obtained written consent

LONG FORM RFP - \$250,000 and up

RFP AUTHOR: **Yellow** is to be filled-in or changed by you. **Blue** are alternate choices/options. **Red** are instructions to be deleted before finalizing.

from each of those employees before forwarding such personal information to the College. Such written consents are to specify that the personal information may be forwarded to the College for

the purposes of responding to this RFP and use by the College for the purposes set out in the RFP. The College may, at any time, request the original consents or copies of the original consents from Proponents, and upon such request being made, Proponents will immediately supply such originals or copies to the College.

SCHEDULE A - RECEIPT CONFIRMATION FORM

[Author: If you do not require Proponents to send in a Receipt Confirmation Form, please delete this page and modify the rest of the RFP accordingly (Terms and Conditions/Headings/Table of Contents). If you do need to include the Receipt Confirmation Form, please modify it to reflect your RFP process as directed below]

[Subject]

College of the Rockies

Closing Date and Time: []

For any further distributed information about this Request for Proposals, please return this form by fax as soon as possible to:

Tracy Doyle, Purchasing Agent tdoyle@cotr.bc.ca Fax: 250.489.8294

COMPANY: _____

STREET ADDRESS: _____

CITY: _____ POSTAL/ZIP CODE: _____

PROVINCE/STATE: _____ COUNTRY: _____

MAILING ADDRESS, IF DIFFERENT: _____

FAX NUMBER: (___) _____ PHONE NUMBER: (___) _____

CONTACT PERSON: _____

TITLE: _____

E-MAIL ADDRESS: _____

[Author: include if Receipt Confirmation Form required for additional information to be sent to Proponents]

Please send us any subsequent information about this Request for Proposals by:

Courier Collect: Courier Name and Account No. _____

Fax (default if no box checked)

E-Mail

OR [Author: include if additional information will be posted only on BC Bid AND Receipt Confirmation Form is required for Proponents Meeting]

Suppliers: Please note all subsequent information will ONLY be posted on BC Bid

AND [Author: include if Receipt Confirmation Form required for Proponents Meeting]

Proponents Meeting Response:

We will be sending _____ (number) representatives to the Proponents' meeting.

We will not be attending but will probably be submitting a proposal.

SCHEDULE B - FINANCIAL RESPONSE

Fees should be provided in Canadian Dollars, before taxes.

Rate Structure	Cost	Per
Rate		
Travel Cost		
Disbursement		
Any other information on rates, pricing or assumptions the Respondent deems appropriate.		

APPENDIX A – RFP DETAILS

1. SUMMARY OF THE REQUIREMENT

The College, through this RFP, is inviting experienced Respondents to submit responses to provide the following services/goods:

(Insert Text: Provide a brief description of the project or program requirement so the proponents can form an opinion as to whether they are interested enough to read the whole document. Any mandatory requirements such as qualifications, location, or maximum price, should also be included in this section.)

2. COLLEGE OF THE ROCKIES SITUATION/OVERVIEW

(Insert Text: Describe how this RFP project will affect the College's business/program or function.)

2.1 College of the Rockies's Responsibility

(Insert Text)

2.2 Project Scope/Budget

(Insert Text)

3. PROPOSAL SUBMISSION REQUIREMENTS

In order to be considered, Respondents must submit their responses prior to the closing date noted in Section 1.3 Key Dates & Deadlines of the RFP Summary Information.

4. EVALUATION

This section details all of the mandatory and desirable criteria against which proposals will be evaluated. Proponents should ensure that they fully respond to all criteria in order to receive full consideration during evaluation.

4.1 Mandatory Criteria

In order to be considered, Proponents must submit their responses prior to the closing date noted in section 2. Key Dates & Deadlines. Proponents should submit their responses in a format that addresses the requirements under the section titles as identified in the table below. **SUBMISSIONS WILL NOT BE CONSIDERED IF THEY FAIL TO SUBMIT A SECTION IDENTIFIED AS A MANDATORY COMPLIANCE ITEM.**

[Author: Modify the sample table below as needed. Identify the qualifications that the respondents should demonstrate in their proposal. Compliance should be identified as mandatory if they are ABSOLUTELY required (A CANDIDATE CANNOT BE CONSIDERED IF THEY FAIL TO MEET MANDATORY REQUIREMENTS). All other requirements are preferred requirements. Preferred requirements should list items that the proponents could demonstrate in their proposal.]

Section Title	Requirements	Compliance
Schedule A - Confirmation of Offer	Proponents *must* complete and sign Schedule A. Failure to do so will result in non-compliance of your response.	MANDATORY
Qualifications	Proponents must submit a resume with sufficient information to allow a meaningful assessment of their experience and expertise, and provide examples where appropriate, to demonstrate experience in: <ul style="list-style-type: none"> extensive experience implementing and developing curriculum implementing; and managing the project 	MANDATORY
References	Supply a minimum of two (2) clients/ companies, and appropriate and current contact references. Please include description of the services provided. Please indicate if the College can contact your reference.	MANDATORY
Consultant Statement	Proponents must provide information explaining if they consider themselves an independent Consultant under CRA.	MANDATORY
Schedule B – Financial Response	Proponents must provide a completed Schedule B.	MANDATORY
Table of Contents	The Table of Contents should include the Section titles and corresponding page numbers.	PREFERRED
Executive Summary	Provide a brief profile of your company indicating industry experience (1000 words maximum)	PREFERRED
Account Management & Service	Describe in your Response your approach to enable efficient and effective contract management for the duration of any agreement, including: <ol style="list-style-type: none"> Describe in detail any Key Performance Indicators (KPI's) currently in place within your organization to measure performance. Key personnel that would work directly with the College. 	PREFERRED
Value Added Services	Detail any value added services that your firm can provide that may complement or enhance our requirements.	PREFERRED

4.2 Desirable Criteria

Proposals meeting all of the mandatory criteria will be further assessed against desirable criteria.

Criterion	Weight	Minimum score
Qualifications	50%	
References	20%	
Financial Response	30%	

5. PROPOSAL FORMAT

The following format, sequence, and instructions should be followed in order to provide consistency in Proponent response and ensure each proposal receives full consideration. All pages should be consecutively numbered.

- a. An unaltered and completed Request for Proposals cover page, including Proponent Section as per instructions.
- b. Table of contents including page numbers.
- c. A short (one or two page) summary of the key features of the proposal.
- d. The body of the proposal, including pricing, i.e. the "Proponent Response".

6. PROPONENT RESPONSE

[Author: This section should describe to Proponents the type of information that you would like to see in their response. For example, "describe in detail your company's past experience delivering similar services"]

In order to receive full consideration during evaluation, proposals should include a detailed response to the following:

LONG FORM RFP - \$250,000 and up

RFP AUTHOR: Yellow is to be filled-in or changed by you. Blue are alternate choices/options. Red are instructions to be deleted before finalizing.

APPENDIX B - CONTRACT FORM

By submission of a proposal, the Proponent agrees that should its proposal be successful the Proponent will enter into a Contract with the College in accordance with the terms of the following draft General Service Agreement and attached Schedules.

[Author: Attach College of the Rockies General Service Agreement and the applicable schedules]

PROPONENT NAME

EVALUATORS:

Number	EVALUATION CRITERIA	EVALUATORS:			COMMENTS / RATIONALE FOR SCORE
		Criteria Addressed	Available Points	Weighted Score	
1 MANDATORY CRITERIA					
a)	The proposal must be in English.				
b)	The proposal must comply with the delivery requirements set out in the RFP.				
c)	The proposal must be signed by an authorized representative of the Proponent or by using the e-bidding key on BC Bid (if electronic submissions are permitted).				
d)	The proposal must be submitted using the RFP Proposal Form.				
e)					
	Passed All Mandatories (Yes / No)				
<p>NOTES FOR USING THIS EVALUATION HANDBOOK</p> <p>The Evaluation team may award points for related, valuable information provided in the proposal that is not included in the criteria below. Evaluators may also award partial points (i.e. 1/2) if a criterion is mentioned or additional related and valuable information is included, but details are lacking for the evaluators to understand what is being offered.</p> <p>In all cases, Evaluators are expected to insert a "1" in column D for those criteria that are fully met in the proposal, and to include comments to support how it is met if this is not obvious. Comments are also expected where only 1/2 points are given explaining the rationale for the award, and to fully describe any points given for additional information not included in the criteria.</p>					
2 PROPOSED SUB-CONTRACTORS					
	In the Comments column, indicate the proposed sub-contractors. If sub-contractors will be used, insert "none". If sub-contractors will be used but were not named, specify this.				Not evaluated.
3 EXECUTIVE SUMMARY					
	Provide an Executive Summary of the key points of this proposal.				Not evaluated in this section. However, any information relevant to other sections of the RFP can be considered.
4 PROPONENT EXPERIENCE					
	Provide two to four examples of projects that the Proponent and/or proposed subcontractor(s) have completed within the past three years (as of the closing date of the RFP) and include all the information requested below.				
a)					

PROPONENT NAME

EVALUATORS:

Number	EVALUATION CRITERIA	Criteria Addressed	Available Points	Weighted Score	COMMENTS / RATIONALE FOR SCORE
	SCORE:	0		0	
e)					
	SCORE:	0		0	
Total Score: Proponent Experience			0	0	
5 APPROACH					
	In the space below, propose an approach that addresses the requirements in section 5 above. Include any additional processes in your approach that may improve quality, increase efficiency, and/or otherwise benefit the College that are included in the price proposed, explaining why such processes are recommended.				
	<i>Proposed Approach will likely improve quality (explain how in the Comments section)</i>				
	<i>Proposed Approach will likely increase efficiency (explain how in the Comments section)</i>				
	<i>Proposed Approach has another benefit to the College (explain what in the Comments section)</i>				
	SCORE:	0		0	
Total Score: Approach			0	0	
6 PRICE					
	OPTION #1: Provide a single proposed price, as described above. Do not include GST or PST (if applicable) in this price.				

PROPONENT NAME

EVALUATORS:

Number	EVALUATION CRITERIA	Criteria Addressed	Available Points	Weighted Score	COMMENTS / RATIONALE FOR SCORE
	<i>Insert price proposed in the Comments Section</i>				
	SCORE:				
	OPTION #2: Complete the following table. Do not include GST or PST (if applicable) in the prices proposed.				
	<i>Insert price proposed for price #1</i>				
	<i>Insert price proposed for price #2</i>				
	<i>Insert price proposed for price #3</i>				
	<i>Insert price proposed for price #4</i>				
	TOTAL PRICE FOR EVALUATING THIS PROPOSAL:				
	SCORE:				
	Total Score: Price		0	0	
TOTAL SCORE FOR PROPONENT					
	Total Score for Proponent		0	0	

Invitation to Quote for Services (ITQS)

[RFP AUTHOR: Before issuing the ITQS, please delete all highlights and delete this page.

Red are instructions to be deleted before finalizing.

Yellow is to be filled-in or changed by you.

Blue are alternate choices/options.

[This ITQS must not be used when procuring IT licenses with software maintenance, support or installation services. Please consult on the appropriate procurement process to use.]

The ITQ for Services template can only be used when ALL of the following applies:

1. The General Service Agreement (“GSA”) is the form of contract that is to be used (see attached);
2. Schedule A-Services of the GSA is completely developed and no changes will be made to it in the final signed contract (with the possible exception of actual start and end dates); and
3. No evaluation applies, as the award will be made to the lowest price that meets all the stated requirements.



INVITATION TO QUOTE FOR SERVICES (ITQS)

This is NOT an order.

Issue Date: **DATE – LOCATION**

QUOTATIONS MUST BE RECEIVED **BEFORE 2:00 P.M. (Mountain Time) ON DATE, 201#** AT THE FOLLOWING LOCATION:

**College of the Rockies
2700 College Way, Box 8500,
Cranbrook B.C., V1C 5L7**

ATTENTION: Tracey Doyle, Purchasing Agent

(Note: email tdoyle@cotr.bc.ca for inquiries only, NOT for Quotation submission)

THIS QUOTATION IS SUBMITTED BY:

LEGAL NAME OF BIDDER: _____

ADDRESS: _____

PHONE: _____ EMAIL: _____

SIGNATURE: _____ DATE: _____

NAME OF AUTHORIZED REPRESENTATIVE (PLEASE PRINT): _____

CHECKLIST FOR BIDDERS:

1. Read all the terms and conditions.
2. Complete the following pages that make up your quotation (the "Quotation"):
 - A signed front cover page of this ITQS (or signed cover page with the ITQS information requested in this ITQS front cover page);
 - A completed Appendix 1 (Schedule "B"); and
 - A completed Appendix 2 (Additional Information Sheet), if attached to this ITQS.
3. Submit the Quotation before the closing date and time set out on the front cover page of this ITQS.
4. Deliver the Quotation by **hand / courier** to the closing location, or by **facsimile transmission** to the fax number, identified on the front cover page of this ITQS, or **electronically via BC Bid** (www.bcbid.ca) (if e-bid delivery is applicable to this ITQS).
5. **Quotations must not be sent by email.**

Invitation to Quote Terms and Conditions

1. Bidders must submit a Quotation that complies with the instructions provided as a “Checklist for Bidders” found on the front cover page of this ITQS.
2. By submitting a Quotation in response to this ITQS, the bidder is deemed to have agreed to the terms and conditions of this ITQS, and if selected as the successful bidder, to supply the services listed at the prices quoted in the submitted Quotation on the terms and conditions of the General Service Agreement, including the Schedules embedded in this ITQS document.
3. Quotations will be marked with their receipt time at the closing location. Only complete Quotations received and marked before closing time will be considered to have been received on time. Hard copies of late Quotations will not be considered or evaluated. Electronic Quotations that are received late will be marked late and will not be considered or evaluated. In the event of a dispute, the Quotation receipt time as recorded at the closing location will prevail whether accurate or not.
4. Quotations will remain valid for 30 days from the closing date of this ITQS, despite anything to the contrary on the Quotation.
5. Lowest or any Quotation will not necessarily be accepted.
6. Bidders must comply with all applicable laws.
7. Bidders are solely responsible for their own expenses, if any, in preparing and submitting a Quotation and, if successful, in finalizing a contract.
8. Quotations must be submitted in English as the working language of the Province is English.
9. If a key resource is named in a Quotation, the bidder represents and warrants that the key resource named meets all of the requirements set out in this ITQS.
10. Once an award is made, the successful bidder will be held to its Quotation as of the closing date of the ITQS even if the bidder later alleges a mistake was made in the Quotation.
11. If a bidder discovers that it has made an error in its Quotation, the bidder may forward a correction notice to the College at the location identified on the front cover page of this ITQS or withdraw its Quotation, but the correction or withdrawal must be received before the closing date and time for the ITQS.
12. Before an award is made, if it appears that an error has been made in a Quotation, the College may, in its sole discretion, communicate with the bidder to ascertain if it wishes to honour the Quotation or permission to withdraw the Quotation. If the bidder is permitted to withdraw its Quotation, the Quotation will not be considered further.
13. The College reserves the right to award this order in part or in full, on the basis of Quotations received unless the bidder specifies that its Quotation is valid only for the complete order.
14. The College may consider and evaluate any Quotation from another jurisdiction on the same basis that the government purchasing authorities in those jurisdictions would treat a similar Quotation from a British Columbia supplier.
15. It is intended that a contract on the terms and conditions of the General Service Agreement will be issued to the bidder whose Quotation has the lowest fixed price/rate/unit price (as applicable to this ITQS) for the Services. The College will not be obligated in any manner to any bidder whatsoever until a General Service Agreement has been executed and delivered by both the College and the successful bidder respecting a Quotation.
16. Neither acceptance of a Quotation nor execution of General Service Agreement will constitute approval of any activity or development contemplated in any Quotation that requires any approval, permit, license or other statutory authority pursuant to any federal, provincial, regional district or municipal statute, regulation or by-law.
17. All inquiries related to this ITQS are to be directed to the College, to the contact person noted on the front cover page of this ITQS. Information obtained from any other source is not official and may be inaccurate. Inquiries and responses may be posted on the BC Bid website (www.bcbid.ca) or distributed to all bidders, at the College’s option.
18. All documents submitted to the College are subject to the disclosure provisions of the *Freedom of Information and Protection of Privacy Act*. For further information about Freedom of Information please see http://www.cio.gov.bc.ca/cio/priv_leg/index.page.
19. While the College has used considerable efforts to ensure an accurate representation of information in this ITQS, all bidders are urged to conduct their own investigations into the material facts. The College will not be held liable or accountable for any error or omission in any part of this ITQS.

GENERAL SERVICE AGREEMENT

To review the terms and conditions that will apply to these services, please refer to the College's General Service Agreement (GSA), attached.

Schedule B will be completed based upon the Quotation.

[Author: regarding Schedule C – Insurance, for Information Technology & Management Consulting Professional Services or Financial Review and Assurance Services, copy and paste section (b) from the applicable GSA template.

To determine which, if any, additional types of insurance should be included in this section 1, contact the Risk Management Advisor]

APPENDIX 1

(Schedule B – Fees and Expenses)

Complete and submit this Appendix 1, clearly identifying the price(s) proposed for the Services in Schedule A of the GSA. [Author: Describe how the lowest price bid will be determined – e.g. is it the lowest overall, firm fixed price? The lowest hourly rate? A sample purchase of the unit pricing bid? Etc. This information must be very clear, in order to avoid any disputes over which bidder offered the lowest price.]

Schedule B of the GSA will be completed during contract finalization to match the information provided in this Appendix 1.

[Author: Choose ONE option below, being sure to match the information provided the Checklist for Bidders found on the front cover page and DELETE the other options.]

Option a)

Firm, fixed, all-inclusive price for all services described in this ITQS and any addenda:	\$
---	----

Option b)

Hourly/Daily* Rate for all services described in this ITQS and any addenda:	\$
---	----

* Daily Rates are to be based on a x-hour day.

Option c)

Unit price for all services described in this ITQS and any addenda.	\$
---	----

A "Unit" means [insert definition]

APPENDIX 2

[Author: If applicable, describe the additional information that bidders are to provide in their Quotation; this could include a checklist where bidders are to indicate “yes/no” for meeting each of the requirements, or it could be copies of documentation, such as certification. If Key Personnel are part of this process (as described in Schedule A), identify the qualifications and/or minimal experience required (by role, if more than one is required), and tell bidders to name the individual who meets that criteria. Note that all qualifications and/or minimal experience listed are mandatory requirements (i.e. yes/no criteria), and cannot be evaluated on how well a named individual meets the criteria.

If not applicable, delete Appendix 2.

This ITQS Process does not allow for any scoring of submissions; this appendix is only intended as confirmation that specific mandatory requirements have been met (i.e. the information is included and therefore the mandatory is met, or the information is missing and therefore the mandatory is not met). If this information is to be evaluated or scored to determine how well it meets requirements, use the Request for Proposal template rather than the ITQS.]

Bidders responding to this ITQS must provide:

[Insert additional requested information.]

[RFP AUTHOR: Before issuing the ITQG, please delete all highlights and delete this header.

Red are instructions to be deleted before finalizing.

Blue are alternate choices/options.

Yellow is to be filled-in or changed by you.]

Appendix E-4



Invitation to Quote for Goods
College of the Rockies
Identify the Good(s)

The College of the Rockies invites you to provide pricing and availability based on the following:

1. Submissions will be received in the Office of the Purchasing Agent, 2700 College Way, Cranbrook, BC V1C 5L7 no later than **DATE**, noon, local time.
2. All queries shall be submitted by email to **Manager's** name and title, [email address](#).

General Description – See Attached

Miscellaneous

The good must comply with the following government regulations and requirements for operation within B.C:

Delivery

State the number of days from the date of order to the date of delivery of the unit F.O.B. College of the Rockies.

The College reserves the right to accept or reject any or all offers, and to waive any minor informality or irregularity in offers received. The lowest or any offer not necessarily accepted.

Tracy Doyle

Purchasing Agent, College of the Rockies

250.489.8262

250.489.8221 fax

Email: tdoyle@cotr.bc.ca



Request for Expressions of Interest (RFEI)

Project/Initiative Title

The College of the Rockies (“the College”) is requesting expressions of interest from interested parties for the supply of [DESCRIBE REQUIREMENT OR BUSINESS ISSUE]. This RFEI is intended to determine whether or not there is sufficient market interest to proceed to a competitive bidding process. In the event there is sufficient interest in this requirement, the College may, but is not obligated to, initiate a competitive bidding opportunity.

[BRIEF COLLEGE OVERVIEW E.G., VISION AND MISSION]

[BRIEF BACKGROUND STATEMENT]

[BRIEF DESCRIPTION OF THE PROJECT OR INITIATIVE UNDER CONSIDERATION]

Interested parties are invited to respond to this RFEI by submitting a letter to the College that includes a brief statement of the nature of their interest in the College’s requirement. Responses should only include a statement of interest, and should not include any other information or qualifications. There will be no evaluation, ranking, or selection of vendors as a result of this RFEI; it will not be used to pre-qualify or screen vendors for a subsequent competitive bidding process, if any.

If subsequent competitive bidding opportunities are issued, the College is under no obligation to advise any vendor responding to this RFEI. Vendors should monitor the BC Bid website (www.bcbid.ca) for such opportunities, which will be open to all vendors, whether or not a response to this RFEI was submitted.

Responses should be delivered by hand, regular mail, facsimile or email to the following location before [DATE], and should quote RFEI Title [Project/Initiative Title]:

College of the Rockies
Tracy Doyle, Purchasing Agent
2700 College Way, Box 8500,
Cranbrook B.C., V1C 5L7
Tel: 250-489-8262
tdoyle@cotr.bc.ca

OR

One complete electronic response should be submitted in accordance with BC Bid instructions for e-bidding and be received before the date stated above. Only registered e-bidders can submit responses on BC Bid. For more information on e-bidding refer to www.bcbid.ca. Contact Person: Tracy Doyle, Purchasing Agent, College of the Rockies.

Request for Qualifications

This Request for Qualifications template is to be used to create a pre-qualifying list of vendors for goods, services or construction who would then be eligible to participate in a subsequent tendering process e.g., the Request for Proposal process.

Instruction to the RFQ Author

1. Notes to the RFQ Author are in **[blue in brackets]** and are to be completed as applicable. The Notes to RFQ Author are to be removed before issuing the Request for Qualifications.
2. **Delete this page and its page break when you have completed the RFQ.**



Request for Qualifications

[Two-part process]

[subject]

Issue date: [Date]

Closing location:

COURIER or BY HAND ONLY:
College of the Rockies 2700 College Way, Box 8500 Cranbrook B.C., V1C 5L7 Attention: Tracey Doyle, Purchasing Agent

Closing date and time:

A. [@number] complete hard copies of each Response must be received before 2:00 PM Mountain Time on [@date]

OR [delete B. if electronic bidding not an option]

B. If electronic delivery on BC Bid is the delivery method selected, one complete electronic Response must be received before 2:00 PM Mountain Time on [@date] in accordance with BC Bid instructions. Only pre-authorized e-bidders registered on BC Bid can submit an electronic Response.

Contact person:

[@name], [@title]

Fax: (250)

[@email address, if applicable]

Table of Contents

- 1. Overview of the Requirement 4
- 2. Request for Qualifications Definitions 4
- 3. Request for Qualifications 5
 - 3.1 Enquiries 5
 - 3.2 Closing Date 5
 - 3.3 Late Responses 5
 - 3.4 Qualifications Review Committee 5
 - 3.5 Review and Selection 5
 - 3.6 Estimated Time-Frames 6
 - 3.7 Signed Responses 6
 - 3.8 Changes to Response Wording 6
 - 3.9 Respondent Expenses 6
 - 3.10 Acceptance of Responses 6
 - 3.11 Request for Proposals 6
 - 3.12 Definition of Contract 7
 - 3.13 Modification of Terms 7
 - 3.14 Ownership of Responses 7
 - 3.15 Confidentiality of Information 7
 - 3.16 Collection and Use of Personal Information 7
 - 3.17 (a) Receipt Confirmation Form 7
 - (b) Additional Information on the RFQ 8
 - 3.18 Respondent Meeting 8
 - 3.19 Debriefing 8
 - 3.20 Form of Contract 8
- 4. Services
 - 4.1 Services 8
- 5. Qualifications Review Criteria 9
 - 5.1 Mandatory Criteria [delete if no mandatories] 9
 - 5.2 Desirable Criteria 9
- 6. Respondent’s Response 10

List of Appendices

- Appendix A Cover Letter
- Appendix B Receipt Confirmation Form

1. Overview of the Requirement

[RFQ drafter: insert brief overview of program related to this RFQ.]

The purpose of this Request for Qualifications (RFQ) is to determine if there are qualified [insert description of the kind of service providers].

Based on the review of the RFQ Responses the College of the Rockies (“the College”) intends to issue a Request for Proposals to Qualified Respondents who may then be invited to enter into a [or multiple] Contract(s) for provision of the services described in section 4.

2. Request for Qualifications Definitions

Throughout this Request for Qualifications, the following definitions will be used:

- a) “BC Bid” means the electronic tendering service maintained by the Province;
- b) “BC Bid Website” means the website maintained by BC Bid at www.bcbid.ca, or any replacement website;
- c) “Contract” means a written contract executed by the College and the Contractor as a result of an RFP;
- d) “Contractor” means a Qualified Respondent who is the successful Proponent to an RFP who enters into a Contract with the College;
- e) “must” or “mandatory” means a requirement that must be met in order for a Response to receive consideration; [delete if no mandatories]
- f) “Province” means Her Majesty the Queen in Right of the Province of British Columbia and includes the Ministry of [@ministry];
- g) “Qualified Respondent” means a Respondent possessing the qualifications described in this RFQ;
- h) “Respondent” means an individual or a company that submits, or intends to submit, a Response;
- i) “Response” means a statement of qualifications submitted in reply to this RFQ;
- j) “RFP” means a Request for Proposals for provision of the services described in Section 4 that may be issued to all Qualified Respondents;
- k) “RFQ” means the process described in this Request for Qualifications; and
- l) “should” or “desirable” means a requirement having a significant degree of importance to the objectives of this RFQ.

3. Request for Qualifications

3.1 Enquiries

All enquiries related to this RFQ are to be directed, in writing, to the contact person at the mailing address on the front cover of this RFQ **[if you will accept enquiries by email, replace “mailing” with “e-mail” and insert the email address on the front cover]**. Information obtained from any other source is not official and should not be relied upon. Do not contact the Ministry/agency involved. Enquiries and answers will **[option: “may”]** be recorded and may be distributed to all Respondents at the College’s option.

3.2 Closing Date

[@number] complete hard copies of each Response **[option: “plus one electronic copy on diskette”]** must be received **[if you want to be flexible on the receipt time, delete “must be received” and replace with “are to be received”]** before 2:00 PM, Mountain Time, on **[@date]** at the address on the front cover of this RFQ. Responses must not **[option: “may”]** be sent by facsimile or e-mail. Responses and their envelopes should be clearly marked with the name and address of the Respondent, the RFQ number, and the project or program title.

OR [if electronic bidding is also available, include the paragraph below]

One (1) complete electronic Response must be received **[if you want to be flexible on the receipt time, delete “must be received” and replace with “is to be received”]** in accordance with BC Bid instructions for e-bidding before 2:00 PM, Mountain Time on **[@date]**. Only pre-authorized e-bidders registered on BC Bid can submit electronic Responses.

Respondents must choose **one delivery method only** and must submit a Response **either** in hard copy format **or** electronically through BC Bid.

3.3 Late Responses **[delete this paragraph if you want to be flexible on receipt time and renumber paragraphs]**

Responses will be marked with their receipt time at the closing location. Only complete Responses received and marked before closing time will be considered to have been received on time. Hard-copies of late Responses will not be considered or evaluated and will be returned to the Respondent. Electronic Responses that are received late on BC Bid will be marked late and will not be considered or evaluated. In the event of a dispute, the Response receipt time as recorded at the closing location for hard copy Responses or on BC Bid for electronic Responses will prevail whether accurate or not.

3.4 Qualifications Review Committee

Review of Responses will be by a committee **[if more than one review committee will be involved, state “one or more committees”]** formed by the College and may include employees and contractors of the College.

3.5 Review and Selection

The qualifications review committee will check Responses against the mandatory criteria. Responses not meeting all mandatory criteria will be rejected without further consideration. Responses that do meet all the mandatory criteria will then be assessed and scored against the desirable criteria. Responses not meeting a minimum score (if specified) **[option if pass/fail]**

process used– “Responses not achieving a pass in every category”) in a category will not be considered further. Qualified Respondents will be provided with a copy of the RFP if one is issued.

3.6 Estimated Time-Frames [delete this paragraph if not required and renumber paragraphs]

The following timetable outlines the anticipated schedule for the RFQ, RFP and Contract process. The timing and the sequence of events resulting from this Request for Qualifications may vary and shall ultimately be determined by the College.

Event	Anticipated Date
Request for Proposal anticipated issue date	[@date]
Anticipated signing date of Contract	[@date]
[@any other milestone]	

3.7 Signed Responses

The Response must include a cover letter substantially similar to the cover letter set out in Appendix B and the cover letter must be signed, , by a person authorized to sign, , on behalf of the Respondent and to bind the Respondent to statements made in the Response to this RFQ.

If the Response is submitted electronically on BC Bid, the Response must be submitted by a person authorized to submit the Response on BC Bid and to use the Respondent’s e-bidding key as signature on behalf of the Respondent and to bind the Respondent to statements made in the Response to this RFQ].

3.8 Changes to Response Wording

The Respondent will not change the wording of its Response after the closing date and time specified on the front cover of this RFQ and no words or comments will be added to the Response unless requested by the College for purposes of clarification.

3.9 Respondent Expenses

Respondents are solely responsible for their own expenses in preparing a Response and for subsequent negotiations with the College, if any. The College will not be liable to any Respondent for any claims, whether for costs or damages incurred by the Respondent in preparing the Response, loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

3.10 Acceptance of Responses

This RFQ is not an agreement to purchase goods or services. The College is not bound to enter into a Contract with any Qualified Respondent. Responses will be assessed in light of the qualification review criteria. The College will be under no obligation to receive further information, whether written or oral, from any Respondent.

3.11 Request for Proposals

It is anticipated that an RFP will be issued to all Qualified Respondents within [@number] months. [describe what will happen if their qualifications change before an RFP is issued]

3.12 Definition of Contract

Notice in writing to a Respondent that it has been identified as a Qualified Respondent will not constitute a Contract nor give the Respondent any legal or equitable rights or privileges relative to the service requirements set out in this RFQ or in any subsequent RFP. Only if a Qualified Respondent and the College enter into a subsequent full written Contract, as a result of an RFP, will a Respondent acquire any legal or equitable rights or privileges.

3.13 Modification of Terms

The College reserves the right to modify the terms of this RFQ at any time in its sole discretion. This includes the right to cancel this RFQ at any time without issuing an RFP and the right to cancel the RFP at any time without entering into a Contract.

3.14 Ownership of Responses

All documents, including Responses, submitted to the College become the property of the College. They will be received and held in confidence by the College, subject to the provisions of the *Freedom of Information and Protection of Privacy Act*.

3.15 Confidentiality of Information

Information pertaining to the College obtained by the Respondent as a result of participation in this RFQ and any subsequent RFP is confidential and must not be disclosed without written authorization from the College.

3.16 Collection and Use of Personal Information

Respondents are solely responsible for familiarizing themselves, and ensuring that they comply, with the laws applicable to the collection and dissemination of information, including resumes and other personal information concerning employees and employees of any subcontractors. If this RFQ requires Respondents to provide the College with personal information of employees who have been included as resources in response to this RFQ, Respondents will ensure that they have obtained written consent from each of those employees before forwarding such personal information to the College. Such written consents are to specify that the personal information may be forwarded to the College for the purposes of responding to this RFQ and use by the College for the purposes set out in the RFQ. The College may, at any time, request the original consents or copies of the original consents from Respondents, and upon such request being made, Respondents will immediately supply such originals or copies to the College.

3.17 (a) Receipt Confirmation Form [include (a) and delete (b) if a Receipt Confirmation Form will be used OR include (b) and delete (a) if a Receipt Confirmation Form will NOT be used and amendments will be posted on BC Bid]

Respondents are advised to fill out and return the attached Receipt Confirmation Form. All subsequent information regarding this RFQ, including changes made to this document, will be directed to Respondents who return the Receipt Confirmation Form. Subsequent information will be distributed by the method indicated on the Receipt Confirmation Form.

OR

(b) Additional Information on the RFQ

All subsequent information regarding this RFQ, including changes made to this document, will be posted on the BC Bid Website. It is the sole responsibility of the Respondent to check for amendments and additional information on the BC Bid Website.

3.18 Respondent Meeting [include this provision only if a meeting is planned; edit as needed]

A Respondent meeting may be held at the College’s sole discretion. Respondents may attend an arranged meeting in person or participate by teleconference call (if available). A transcript or minutes of the meeting will be posted on the BC Bid Website. Please advise the contact person by e-mail of the estimated number of attendees. Participation is optional **[option: “mandatory”]**. There will be limited opportunity for oral questions at the Respondent meeting. Therefore, questions should be forwarded in advance by e-mail or by facsimile, prior to the meeting, to the contact person designated on the front cover of this RFQ. **[direct Respondents to one location for contact information as default; if different location, can so specify]**

3.19 Debriefing [include only if debriefing will be provided]

The College will offer a debriefing to Respondents who did not make the List of Qualified Suppliers, on request, at a mutually agreeable time.

3.20 Form of Contract

Any Contract with a Qualified Respondent will be substantially similar to the terms and conditions of the College’s General Service Agreement, a copy of which is attached.

4. Services

4.1 Services

The Qualified Respondents who become Contractors may perform and be responsible for the following services and duties:

- (a) ;
- (b) ;
- (c) ;
- (d) ;
- (e) ;
- (f) ; and
- (g) .

5. Qualifications Review Criteria

[insert an overview of the Qualification Review Process]

5.1 Mandatory Criteria [delete if no mandatories]

The following are mandatory requirements. Responses not clearly demonstrating that they meet them will receive no further consideration during the qualifications review process.

Criteria	
a)	The Response must be received at the closing location or submitted on BC Bid by the specified closing date and time.
b)	The Response must be in English and must not be sent by facsimile or email.
c)	If delivery by hard copy is selected, [@number] copies of the Response must be submitted. [indicate whether electronic (disk) copies are also required] OR <u>If delivery by BC Bid is selected, one complete electronic Response must be submitted electronically on BC Bid in accordance with BC Bid instructions.</u>
d)	If delivery by hard copy is selected, the Response must include a cover letter substantially similar to the cover letter set out in Appendix B and the cover letter must be signed, by a person authorized to sign on behalf of the Respondent and to bind the Respondent to the statements made in the Response to this RFQ. OR If delivery by BC Bid is selected, the Response must be submitted by an individual authorized to submit a Response on behalf of the Respondent on BC Bid using the Respondent's e-bidding key as signature, and to bind the Respondent to the statements made in the Response to this RFQ.
e)	

5.2 Desirable Criteria

Responses meeting all mandatory requirements will be further assessed against the following desirable criteria. A Respondent not reaching the minimum score (if specified) in a given category [option if using pass/fail: "not achieving a pass"] will receive no further consideration during the qualifications review.

Criterion	Points Available	Minimum score (if applicable)
TOTAL POINTS AVAILABLE	100	

6. Respondent's Response

The following format and sequence should be followed in order to provide consistency in the Respondent's submissions and ensure each Response receives full consideration. All pages should be consecutively numbered. **[attach Appendix B/form and reference in this part, if used, and in mandatories if a mandatory requirement]**

Appendix A – Response Covering Letter

Letterhead or Respondent’s name and address

Date:

[College of the Rockies]
[Address]

Attention: [Name]

Subject: Request for Qualifications No. [], including any amendments or additions (the
“Request For Qualifications”)

NOTE: amendments and additions will be posted to the BC Bid website at www.bcbid.ca It is the Respondent’s sole responsibility to check for amendments and additional information.

The enclosed Response is submitted in response to the above-referenced Request for Qualifications.

We have carefully read and examined the Request for Qualifications and have conducted such other investigations as were prudent and reasonable in preparing the Response. We are authorized to submit this Response on behalf of the Respondent.

Yours truly,

Signature

Name: _____

Title: _____

Telephone Number: _____

e-mail address: _____

Legal name of Respondent: _____

Date: _____

Appendix B

Receipt Confirmation Form

[SUBJECT]

COLLEGE OF THE ROCKIES

CLOSING DATE: []

For any further distributed information about this Request for Qualifications, please return this form by fax as soon as possible to:

Tracy Doyle, Purchasing Agent

College of the Rockies

E-mail: tdoyle@cotr.bc.ca Fax:

Company: _____

Street Address: _____

City: _____ Postal/ZIP Code: _____

Province/State: _____ Country: _____

Mailing Address, if different: _____

Fax Number: (___) _____ Phone Number: (___) _____

Contact person: _____

Title: _____

E-mail Address: _____

Please send us any further correspondence about this Request for Qualifications by:

Courier Collect: Courier Name and Account No. _____

Fax (default if no box checked) **E-Mail**

