**Competitive Bid Scope Document**

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| **General Instructions** |
| When creating an RFx it is imperative to be clear and concise on the requirements that you want to convey to supplier community. This will ensure that suppliers understand what UFV is looking for and to determine if they want to submit a proposal.The following questions are to be answered and submitted to Procurement Service to be incorporated into a RFx document that will be publically posted and responded to by suppliers.Remember to obtain the best results/value for UFV, be open and honest, preconceived ideas on what/who you want are not allowed under competitive bidding. Always ask the 5 “Ws” (Who, What, When, Where, Why) when describing the Goods and Scope of Work you are defining.  |
| **Purpose of this Request**  |
| Provide a general description of the request, the supplier should be able to determine from reading this section whether they intend to respond; include at minimum: * What type of supplier are you looking for:
	+ Project Manager/Engineer
	+ Consultant (with what skills)
	+ Product Supplier
	+ Service Provider
* When do you require the goods to be delivered or how long do plan on using the service for – i.e. project specific or a period of time.
* Are you wanting to create a shortlist or a single supplier.
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| **Your Response:** |
| **Background**  |
| Provide general information about UFV as well as any relevant information about why this request is being issued; include at minimum: * Who is asking – describe which department is managing this project.
* Is this tied to other UFV initiatives, i.e. Campus Planning?
* Provide any background information, or historic information.
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| **Your Response:**Located in the beautiful Fraser Valley just east of Vancouver, British Columbia, Canada, the University of the Fraser Valley (UFV) is a fully accredited, public university that enrolls approximately 15,000 students per year. UFV has campuses and locations in Abbotsford, Chilliwack, Mission, and Hope, and a growing presence in Chandigarh, India. |
| **Scope** |
| Provide details of the scope of work and/or specifications of the goods. Use headings to identify each major component and for clarity, reconcile the order with the stated Derirable Criteria. The Scope is the heart of the RFx Document, as it contains detailed information about your project or specficiations of the goods. The level of information you include is critical to the success of the RFx. By providing clear and thorough information, you are equipping suppliers with a deeper understanding of what you are seeking. This results in higher quality proposals and improves your ability to evaluate or select the right supplier.Provide a clear, complete and properly organized description of your desired deliverables (more details than in the Purpose of this Request Section); consider:* Your goals and objectives of what you are trying to accomplish.
* Description of the services (including location) or generic specifications of the goods.
* Expected delivery dates of the goods or duration of the services.
* Required units.
* Required warranty period.
* Service level requirements.
* Reference any previous work done at UFV, i.e. feasibility studies, reports etc. (if applicable).
* Provide links to external UFV documents (if applicable).
* Provide drawings, pictures or videos (if applicable).
* Indicate if there are any specific confidentiality requirements.
* Are there any standards or federal/provincial or municipal policies they must follow.
* Indicate what is out of scope.
* Indicate specific tasks or work that UFV will manage.

Indicate what a good supplier would look like: * Indicate if they require a specific certification, accreditation or education, i.e. engineer, architect.
* How many minimum years of experience are they required to have.
* What skills or attributes would they require to have, be project specific.
* Are they required to meet with you?

Provide a high level expectation on the work that you are requiring, this will form the basis of the agreement: * Describe to the industry (without being prescriptive) what you are expecting when the project is complete, i.e. a report, a drawing, a building, etc.
* Will they be providing full service, i.e. use sub-contractors.
* Are there phases of the work, provide an expected deliverable for each phase.
* Provide a schedule, be clear when the work needs to start and end.
* Be clear on anything that is critical/important.
* What type of reporting will you require.
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| **Your Response:** |
| **QUESTIONS** |
| RFX best drafting practices is to align questions to the same order as that stated in the Scope and Desirable Criteria. We further suggest the use of a directed response form such as a two-column table with requirements/requests/etc. in one column with the second column for the proponent to complete. An example table is provided immediately below. Proponents could be allowed to attach additional materials with clear reference to the applicable section of the response form. This is where you will ask questions to the proponents: * Consider what is the correct number of questions as each question asked will require the proponents to respond.
* Each question will be reviewed and evaluated on how they best meet your expectations and compared to the other proponents who responded.
* Only ask relevant questions.
* Link to any information provided in the Scope Section or attachments.
* Assume this is an interview and ask questions that will provide you with the right information.
* Review the Purpose of this Request, Background and Scope sections to help you determine what questions to ask.
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| **Your Response:**

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| --- | --- | --- | --- |
| Item | Desirable Criteria | Maximum Points | Minimum Required or N/A |
| 1 | Experience and Qualifications (Criteria One) |  |  |
| 2 | Business Process and Methodology (Criteria Two) |  |  |
| 3 | [Other: insert rows for additional criteria, number accordingly] (Criteria Three….Four....Five, etc.) |  |  |
| 4 | References (Criteria Six) |  |  |
| 5 | Social Procurement Value (Criteria Seven) |  |  |
| 6 | Price Proposal (Criteria Eight) |  | N/A |
| 7 | Value Add (Criteria Nine) |  |  |
|  | **Total Possible** | **100** |  |

**Experience and Qualifications (Criteria One)**

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|  | Question | Your response |
| .1 | Provide a narrative of your capabilities, experience and qualifications demonstrating your abilities to meet the requirements identified in this Request.  | Please refer to the Bonfire Questionnaire Number: XXXXXX to provide your response. |
| .2 | Provide a profile detailing your organization’s history, location, origins, attributes, management structure and contact information for the key person that would service this account. | Please refer to the Bonfire Questionnaire Number: XXXXXX to provide your response. |
| .3 | List and describe the services you offer, including the names of employees that would perform the work, their experience, and qualifications demonstrating that they have the qualifications as identified in this Request. Please indicate if they have had or give consent for a criminal record information check which will be conducted by the RCMP. Please include Resumes. | Please refer to the Bonfire Questionnaire Number: XXXXXX to provide your response. |
| .4 | Describe your response time protocols to demonstrate that you are able to meet the Response Times as identified in this Request.  | Please refer to the Bonfire Questionnaire Number: XXXXXX to provide your response. |
| .5 | Provide a narrative demonstrating that you are able to meet the warranty requirements as identified in this Request.  | Please refer to the Bonfire Questionnaire Number: XXXXXX to provide your response. |
| .6 | Describe your communication and reporting capabilities to demonstrate that you are able to meet the Communication and Reporting requirements as identified in this Request.  | Please refer to the Bonfire Questionnaire Number: XXXXXX to provide your response. |

**Business Process and Methodology (Criteria Two)**

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|  | Question | Your response |
| .1 | Explain your company’s and UFV’s roles and responsibilities during the term of a contract. | Please refer to the Bonfire Questionnaire Number: XXXXXX to provide your response. |
| .2 | Explain the types of key performance indicators (KPI) that you typically use to measure performance during the term of the contract. Are there regular meeting to ensure quality of service is maintained? | Please refer to the Bonfire Questionnaire Number: XXXXXX to provide your response. |

**Other (Criteria Three, Four Five, etc.)**

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| --- | --- | --- |
|  | Question | Your response |
| .1 |  | Please refer to the Bonfire Questionnaire Number: XXXXXX to provide your response. |

**References (Criteria Six)**

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| --- | --- | --- |
|  | Question | Your response |
| .1 | Provide a profile of the number of Higher Education customers/clients you have worked with in Canada. | Please refer to the Bonfire Questionnaire Number: XXXXXX to provide your response. |
| .2 | Provide a history of 3 projects that are similar in scope and services as outlined in this Request. Please include company name and contact information. The proponent authorizes UFV to make such enquiries of references and others that it deems appropriate. | Please refer to the Bonfire Questionnaire Number: XXXXXX to provide your response. |

**Social Procurement Value (Criteria Seven)**

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| Describe all initiatives, policies or programs that demonstrate your company’s effort towards sustainable practices and responsibility (Social, Ethical, Environmental). For example:Within its response, the Proponent could describe any social and community benefits it is prepared to supply as part of the Contract. Unless otherwise stated, it is understood that there are no extra costs for these services, however if there are any additional costs pertaining hereto, the summary and explanation of those costs should be submitted on the Pricing form below.Social, Ethical, Environmental and Community Value items could include:* The employment of barriered individuals.
* The payment of fair wages or living wages to employees.
* Involvement of Social Enterprises in any portion of the work.
* Your company’s supply chain practices which could be inclusive of local sourcing for labour and/or materials.
* Your company’s commitments to a diverse supply chain which could include utilizing non-profits, social enterprises and/or small and medium businesses.
* Your company’s demonstrated commitment to environmental sustainability.
* Your company’s ability to monitor and measure social and community value commitments.
 |
|  |  **Question** | **Your response** |
| .1 | Please provide a narrative describing your company’s Social Procurement Values, including but not limited to your company’s environmental sustainability practices, your company’s ability to monitor and measure social and community value commitments, how you have eliminated or reduced waste in a previous project, etc. | Please refer to the Bonfire Questionnaire Number: XXXXXX to provide your response. |

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| **Price Proposal (Critria Eight)**

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| Prices shall be given in Canadian Dollars with applicable taxes itemized and shown separately ( the table below is just an example, create your specific table with units, items, etc. as applicable to the request]Prices will be evaluated according to the formula:

|  |  |  |
| --- | --- | --- |
| Maximum Points Available for price | X | Lowest Price Offered |
| Price being Evaluated |
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| Item: Description of the component of the supply | Price Offered |
| --- | --- |
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|  |  |
| PST |  |
| GST |  |
| Total |  |

**Value-added Services (Criteria Nine)**

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|  |  Question | Your response |
| .1 | Provide and describe any additional information that may not have been asked for within this Request that the proponent considers to be of important or worthy of consideration in the decision process. | Please refer to the Bonfire Questionnaire Number: XXXXXX to provide your response. |

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