

# The Devil is in the Details!

Presentation to:

Sherwood Park & District Chamber of Commerce

June 5, 2018

# Agenda

- Welcome
- Types of RFx documents
- Mandatory requirements
- What not to do
- Preparing your 'best' RFx – how to maximize your score
- References
- You be the judge
- Questions

# Something to know

- Open public procurement at Strathcona County is carried out by different departments
- For the purpose of this presentation I can only speak to the practices of the Procurement Services Office

# Types of RFX documents

- Request for Proposal (RFP)
  - Scope of work is not clearly defined; requires a proposed solution from the vendor, evaluate other criteria in addition to pricing, award to highest score
- Request for Quotation (RFQ)
  - Clearly defined scope of work which may include specifications, drawings or goods; if there is evaluate other criteria in addition to pricing, award to highest score; if not evaluations, award to lowest price (will be stated in RFQ)
- Invitation to Tender (ITT)
  - Clearly defined scope of work which may include specifications, drawings or goods; contract awarded to lowest compliant bidder, price is the only factor

# Types of RFX Documents (cont'd)

- Request for Supplier Qualifications (RFSQ)
  - Used to evaluate a vendors experience, qualifications, skills, etc in a particular area of expertise. This can be used to prequalify vendors for a specific project or piece of a project (ie directional drilling) or to create a vendor listing for future smaller projects (ie IT services)
- Expression of Interest (EOI)
  - Can be used a prequalification for standing offer agreements – used to see if there is a market interest prior to going, does not result in a contract
- Request for Information (RFI)
  - Used when the County wants to obtain information from the marketplace; this is for information gathering only and does not result in a contract award or include pricing information

# Mandatory Requirements

- All RFX documents may have mandatory requirements, watch for them
- “Typical mandatory requirements can include (this is a sample list only):
  - Submission Form
  - Pricing Form
  - WCB Clearance Letter (note date)
  - Current Certificate of Recognition (COR or SECOR)
  - Current Certificate of Insurance / Letter of Insurability
  - Specific certifications
  - Attendance at a Mandatory Pre-RFX Site Meeting and Tour
    - ❖ The document may note that you must have it, but may not be required to submit proof until award stage, becomes a “pre-condition” of award.

# What not to do

- Arrive late with your bid – do not cut this too close – stuff happens
- Submit expired documents or certifications
- Submit an unsigned Submission Form
- Submit documents in another company's name
- Submit WCB for an industry that is not relevant
- Submit an incomplete Proposal or Form; if an area is not applicable indicate as such
- Submit a Form from another opportunity
- Assume that the County already has your documentation from a prior engagement, e.g. WCB, Insurance
- If you are planning on bidding – do not miss the Mandatory Pre-RFx Site Meeting / Tour or arrive late, or fail to sign in and sign out
- Present an envelope or package that is not sealed shut or labelled as per the RFX instructions
- Present a courier package that is not appropriately labelled with the RFX number and title
- If using a courier put your bid inside a sealed envelope inside the courier envelope - label
- Strongly suggest you do not use Canada Post Courier – the packages are delivered to the Canada Post Office
- Drop off your bid with a County employee or in an area other than the specified in the document

# Preparing Your Best RFx

- Read the document thoroughly before you begin to prepare your submittal
- You want your business to stand-out from your competitors – how are you going to convey that through your submittal
- Note the timeline for the RFx process in the RFx document:
  - Deadline for written inquiries – all inquiries must be in writing, please do not contact people about the RFx at the County, nothing they say is binding and they may have miss-information – there are no ‘dumb’ questions
  - Dates for the shortlisted presentations (if any) – make sure you as the Bidder will be available during those dates, should you be contacted
  - Advise your references of the possible dates they may be contacted to make sure they will be available
- Note the Evaluation Criteria and weighting, hint:
  - If the weighting for price is significant compared to the other factors, sharpen your pencil
  - If the weighting for your key personnel is significant, get your best people on the project
  - Highlight your similar or municipal experience, especially if the RFx requests similar experience



# Preparing Your Best RFX (cont'd)

- Focus on key words throughout the document, e.g. similar experience
- Link your bid format to the RFX – be clear, if they have to go looking, it can cost points – something may be missed
- Projects
  - Define past projects clearly (including the dates for the work) as they relate to the scope of work for this opportunity – give a value for the work
  - If you have a multi-year contract for on-going work give specific examples of work done not just a generic description of the contract
  - Provide 5 years (or however many years are asked for in the document) of projects – enough to demonstrate your expertise
- Value-add – doesn't mean giving something to the County for nothing – think of this as to how your business may differentiate itself from its competitors

# References

- Often, if you are shortlisted, the few points awarded to references could make all the difference
- Obtain permission from your reference
  - If no permission was given, your client may refuse – score = “0”
- The contact information must be current / accurate
  - The County will not hunt down the information, if we cannot get in touch with the reference – score = “0”
- We give the references a deadline to respond – this deadline must be met
- The County typically cannot be used as a reference – could demonstrate bias
- Do not provide two references for the same project and count that as two – score = “0” for the one of the references
- Do not provide references for work your employees did while they worked for another firm – score = “0”

# You be the Judge

- Bids come in for a construction job – a mandatory requirement was for the bidder to provide a high-level project schedule – one bidder out of 6 missed it – is the bid compliant?
- The closing time for the bid is at 14:00:00, the Bidder arrives at 14:00:03 – all the other bids are on-time – is this bid compliant?
- The Bidder did not sign the Submission Form – is it compliant?
- The Bidder is missing mandatory documentation – when they are contacted to make sure the County isn't missing anything the bidder says "I forgot", can I send it in now – what would you do to be fair to all the other bidders?
- **In closing, the County does not want non-compliant bids, but we have the duty to be fair to all bidders – deeming a bidder non-compliant is never pleasant and we take having to do so very seriously.**

# Questions?

- For any questions during an RFx process, email the RFP Contact specified in the documents. (All questions must be submitted in writing to be addressed.)
- For general inquiries, contact the office at [purchasing.inquiries@strathcona.ca](mailto:purchasing.inquiries@strathcona.ca)