

Responding to RFPs at York: Part 1

Responding to a competitive bid is a big undertaking. Often, when something goes to a public competitive tender, there's a large price tag associated with the work. As a public-sector organization, we need to make sure we're getting the best value for the University and taxpayer's money.

The below table outlines the most requested documents in a competitive tender. Even if open, competitive tenders aren't within your scope, this tool can also be used if you want to be considered for smaller value purchases at the university. By using this tool, you'll be able to identify what documents you're most likely to need on bids and why we need them so you can assemble your documents in preparation for the next opportunity.

Document	What is it?	Why do we ask for it?
Executive Business Description or Corporate Mission Statement	This is a concise statement that accurately identifies what your business does. It should also touch on your mission/values.	These statements form the basis of your executive response. You'll need to tailor it to make sure you highlight your competency to perform the work being requested. This is your chance to make a first impression, so you'll want to make sure you communicate your expertise and competence effectively.
Catalogue of Work Experience & References	This is a portfolio of your previous work. Be sure to keep records of the job you did, what you accomplished, the value of the job and the client's contact information. Ask past clients if they would be willing to serve as a reference on your bids.	This is your opportunity to show your experience doing similar work and showcase projects you are proud of. Pay attention to the wording of the request. Unless there are specific requests based on the time or sequence of previous work, you may want to consider including similar work to demonstrate your relevant experience.

Executive /Senior Management CVs	This is a concise summary of the qualifications of key personnel. Be sure to include work experience, education and relevant certifications (if required) that qualify you to perform the work.	Collating CVs is a way to demonstrate your team's experience and ability to complete the project. You may need to tweak these depending on the project to accurately convey your expertise. A helpful tip may be to look at the project summary and compare it to your CVs to make sure they speak well to what the opportunity is looking for.
Organizational Chart	This is a brief schematic of your organization's staff and line management duties.	The organizational chart helps communicate the scale of your organization and your ability to take on the rigours and demands of the project. It also helps us understand how key contacts you identify fit in to the organization and the amount of resources you have to successfully do the work.
Commercial General Liability/ General Liability Insurance	This is a form of insurance that covers your business operations that are typically associated with your ability to deliver the good or service you sell. CGL may cover things such as: subcontractor work, products, injury and property damage.	We want to make sure there's coverage to protect your business as well as the University's interests. Typically, we ask for CGL of \$5-10 million per instance. You will need to add as an 'additional insured' to your documentation to submit. Speak to your insurance provider for further information on how to do this.
Other Insurance (including automotive)	Your industry will dictate whether you need additional insurance, such as professional insurance or property insurance. However, if you are performing work on campus, you'll need commercial automotive insurance.	Any time you are bringing vehicles onto our property to work, we need to make sure you, your staff, your property and our community are financially covered. We typically ask for \$2 million in auto coverage if it's not mentioned in your CGL policy.

Workplace Safety and Insurance Board of Ontario (WSIB)	Depending on your industry, you may be required to carry WSIB insurance. To prove this, you'll need to provide a copy of your Certificate of Clearance which states the activity and outstanding balances or dues on your account. Note, these clearances need to be renewed every 90 days.	We ask for this because we need to make sure any worker you bring on site has coverage should a workplace accident occur. The certificate will demonstrate your standing with the WSIB.
---	--	--

Social Procurement

York's Social Procurement Policy commits us to considering how our purchases can positively impact our communities. This includes providing apprenticeship or employment pathways for equity-deserving groups and embedding diverse-owned businesses and social enterprises into your supply chain. **To score well on a York RFP, you need to demonstrate some corporate policy or directive on social procurement.** You can do this by starting to capture key performance indicators that speak to your policy. **The chart below indicates how you can elevate your response to improve your chance of securing top marks in a bid response:**

Average/Good Reponse	Great Response
• Policy exists • Third party membership supporting social procurement	• Policy exists and goals created • Demonstrate active monitoring and/or KPI's that indicate success • Reports on social procurement activity • Third party membership supporting social procurement with evidence of putting certification or membership into practice (could be built into existing KPIs)

Sustainability

York University has long been recognized as an international leader in sustainability-relevant research, teaching, partnerships, and campus practices. York has embedded sustainable principles in every aspect of university life. We plan to right the future and create positive change with our whole-institution approach to sustainability. As part of this approach, York has made a commitment to reduce indirect and direct emissions by 45 per cent by 2030 to achieve net-zero sooner. **Consider the many ways that your organization can operate sustainably and begin to have conversations with your team about how your business practices can reduce or mitigate the amount of carbon you produce. Also consider the types of materials your organization used and your waste management practices. As always, provide any reports or data to strengthen your response.**

York is also committed to championing the United Nations Sustainable Development Goals (SDGs). Consider which goals most directly align with the SDGs and how your organization can champion some of the calls to action. The best responses will always link policy to reports and KPIs that your organization has undertaken to put policy into action.

