

Responding to RFPs at York: Part 2

Tender Document Walkthrough

1. Definitions

This section identifies key terms used throughout the document. Pay particular attention to any phrase using the terms "must", "shall" or "will". These words indicate that the action is mandatory. For example: Proponents must submit the following... Failure to do so will render the response non-compliant, and your bid will be rejected.

If you see the words "may" or "should", these indicate non-mandatory actions. Failure to respond will not invalidate your bid. That said, you are strongly encouraged to respond to all requests in the tender to strengthen your response.

2. General Information



Schedule of Events

Pay close attention to the dates and milestones in this section. In particular, see if there is a mandatory site meeting. If one is listed and is considered mandatory, you **MUST** attend. Failure to do so will make you ineligible to have your bid considered. Information about the site meeting is usually found in section 2.5.

The Last Business Day for Questions is also important. Once a tender is active (you can see it on MERX), you must submit all questions in writing to the named contact on the document. To ensure fairness, we do not allow private or personal correspondence regarding the tender. Once the deadline for questions has passed, you may not submit questions to York U concerning the tender.

The Release of final Addendum is also important. Sometimes, aspects of the tender may be clarified so we will issue a clarifying addendum. These are released by Procurement Services and done so publicly to ensure fairness. It is your responsibility to make sure you review all addenda and ensure your answers reflect any change in information required by the addendum.

York University Overview

In this section, we are communicating institutional values and key stats which are important for you to know. In your Executive Summary (Section 4.1) consider weaving in some of this language or demonstrate areas of similarity between your business's values and those of the University.

3. Proposal Administration

Submission Process

When you finish your response, please be aware that York uses Bonfire for our bid submissions. There's no charge for uploading documents on this site. Ensure all documents requested are submitted by the deadline. As long as the deadline has not passed, you will be able to view and edit the project listed on Bonfire. Once the deadline has passed, the project will disappear from view. Incomplete applications or applications in process are not accepted past the deadline.

You'll see a list of files you'll need to upload. Each section corresponds to a section in the document. Please save and upload files as they appear in this list. For example: Executive Summary 4.1. Be sure that you are only attaching that section as part of the upload.

Please also take note of the period of irrevocability that is mentioned in this section. What you are entering into here is what is called a Contract A. This means you are promising York that you can complete the work as you've described and at the cost you presented to us. For the irrevocability stage, you are guaranteeing your Contract A for a fixed period. Make sure you account for this when you submit. Reneging on your Contract A submission can have serious consequences.

At the Contract A stage, we evaluate all compliant proposals and determine best value (see Section 8 for more information). We then select the proponent with best value and enter into Contract B. Contract B comes into effect once the contract is signed. At that point, all Contract A submissions are null and void.

4. Proposal Content

This section outlines what you must submit to Bonfire. In order to submit your responses, you will need to save the files as they appear in the section. **Please do not send your responses as one large PDF file.** You run the risk of having your bid rendered incomplete if it's not clear where sections begin and end. As you progress through this stage, you should write in a clear and concise way that seeks to convince York that you are the best company for the job. When you get to Section 4, be sure you've read Section 6 multiple times and have answered every requirement identified, as well as have a plan to complete the work in a way that fits within the timelines proposed and scope of work. Lastly, ensure that you respond to all sections mentioned in Section 4. Often, you'll see the word **MUST** indicating a mandatory requirement. Remember, failure to respond to mandatory requirements will likely disqualify your bid.

Executive Summary

In this section, you'll introduce us to your company and demonstrate your understanding of the project and how/why your company is the right company for the job. Avoid using boilerplate language you use for your company and instead have a look at the values of the institution and see if there are synergies between York's values and yours. You will be evaluated on the technical and financial components of the bid, but value alignment is very important to our brand as well.

Qualifications and Experiences

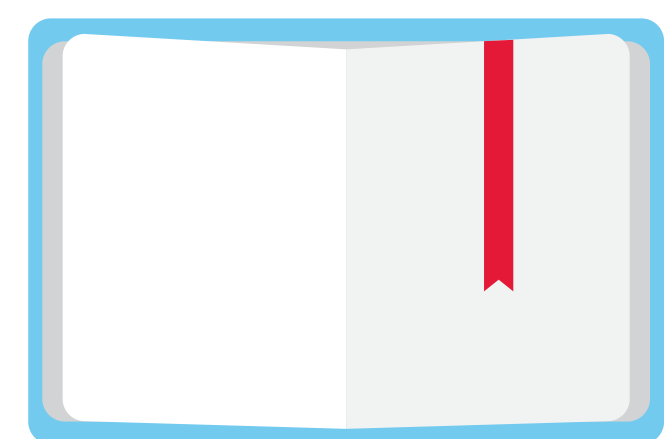
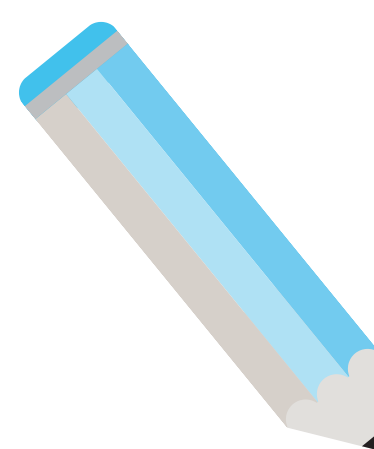
In this section, demonstrate that you have the requisite expertise to complete the project. Usually, we will detail what we're looking for, but it often consists of resumes of key personnel and business history. Unless we state minimum years of operation and project history, you can still submit an application if you're a relatively new company. In this instance, be very clear about the quality and experience of the key personnel York will be dealing with and how you will get the job done.

Methodology

Consider this section as if it were a roadmap you're presenting to us – walking us through the steps you'll take to make this project successful. Where possible, provide SPECIFIC step-by-step information on how the work will be completed. If schedules or tables are given, make sure you use them and answer all information requested. Give yourself ample time to critically review this section. Be on the lookout for any ambiguities in your response and if possible, have a colleague review the project requirements and your response to make sure they align.

Timetable/Workplan

Where the last section talked about how you will complete the project, this section outlines the 'when' you propose the project will be completed. Be sure to mention when key milestones of the project will be completed and include when any reports will be submitted as indicated in Section 6. Similar to section 4, this section is project-specific, so be sure to carefully review the tender for key project milestones and confirm that your response addresses those. Further scheduling breakdowns are dependent on the project in question.



Social Procurement

York is interested in businesses who provide exceptional products and services, and also those who are committed to building more resilient communities. The social procurement section is your chance to tell us about the good your business does in part to making our communities better. Typically, we want to hear about any corporate policies you have that promote equitable outcomes such as apprenticeship programs, mentoring, and diverse hiring practices. We are also interested in hearing about your supply chain diversity initiatives. If you have policies or initiatives designed to encourage business with diverse-owned businesses and social enterprises, please describe them in this section. To receive top marks in the evaluation, you'll need to demonstrate evidence of these policies or initiatives in action. You are strongly encouraged to attach KPIs and reporting you currently undertake. In some instances, there may be project-specific targets that you'll be asked to complete. In these cases, you'll need to demonstrate how you'll achieve the requirements. You can refer to the York U Social Procurement toolbox for how to complete the requirements. There, you'll find key organizations that might be able to help, monitoring and evaluation tools and a directory of organizations who qualify for social procurement spend. If you're selected, York will help to ensure you satisfy the project's requirements.

Sustainability

To support York's goal of creating positive sustainable change, it's important that our contractors ensure their goods and services promote the health of our environment. Usually, Section 6 will identify minimum environmental standards for the project, but we also want to know about how your business takes sustainability seriously. York University has made commitments to promote the United Nations Sustainable Development Goals. We may ask you to comment, depending on the project, how your business champions these goals. In similar fashion to social procurement, successful responses will include policies/initiatives backed-up by evidence through reports or KPIs. York has also made a commitment to reduce indirect and direct emissions by 45 per cent by 2030 to achieve net-zero sooner. While further details will be provided in the York Toolbox, it is a good idea to start to consider your carbon impact now and how you can begin your journey towards reducing emissions.

Financial Considerations

This is where you provide your cost estimate for completing the work. Depending on the project, there may be a schedule for you to complete with itemized costs, so please complete any documents provided. As referenced earlier, when you submit a bid, you are legally bound by your offer for a period of time should your bid be selected. Given this circumstance, it's crucial that you cost the project that works for the health and longevity of your business. Lowballing bids can lead to expensive ramifications. Conversely, overshooting your costs lessens the competitiveness of your offer. Please note as well that the bids you submit are pre-applicable taxes.

References / Past Experiences

By having an up-to-date portfolio, you will be able to easily complete this section. Pay careful attention to any time requirements such as projects in the past five years, or three most recent projects. If there are no conditions, select the projects in your portfolio that best present you and speak to your competency. Similar projects are important as is experience working in the public sector. Typically, we ask for three references. If you provide more references than requested, we will only consider the first three references as they appear.

Insurance and WSIB

Similar to having references at the ready, if you have your insurance documents in order, they can be easily examined to make sure you have the right insurance to perform the work. If you are successful, you will need to name York University as insured on your policy and provide your documents to York within five business days. If your business requires WSIB coverage, you must demonstrate your carrying of WSIB insurance. If your business does not require WSIB, you will need a minimum of \$2 million Employers Liability Insurance. If you're successful, please submit your Certificate of Clearance to York.

Acknowledgement

Section 9 is an acknowledgement form that requires signatures. This is a MANDATORY requirement. Do not forget this as it could invalidate your entire response.

5. Evaluation and Selection

This section outlines how bids will be evaluated and the processes and procedures we take for selecting a proponent. There is nothing to submit for your response from this session. However, it is worth reviewing as you formulate your response to get a sense of how the bid will be evaluated and how you can get feedback on your bid if you were unsuccessful. This section also outlines how to dispute a bid. Note that there are very specific processes you must follow in order to launch a dispute.

6. Project Deliverables

This section contains the specific project deliverables of the opportunity. As each project is unique, this tool cannot go into specifics. Be sure you read this section carefully to ensure you understand what is being asked.

7. Terms and Conditions

Similar to Section 5, Section 7 does not factor into your bid response. However, it outlines some important information about doing business with York University. In it, you'll encounter how we respond to Freedom of Information requests and how we handle sensitive information. You'll also encounter our conflict of interest policy, health and safety while working at York as well as our remuneration policies. Please read this section prior to submitting your bid.

8. Best Value Analysis

Section 8 provides a breakdown for how the bid will be scored. One of the first things to notice is our use of the phrase "Best Value" rather than "Lowest Price" to evaluate responses. We've learned that getting the right product at the right price is a much more holistic exercise than simply taking the lowest price. Sometimes low bids win, but typically that's not how RFPs work. We want to evaluate the entirety of your service offering to make sure York is getting the best product or service for the right price.

There are two sections in the evaluation criteria: the technical evaluation and the financial evaluation. Usually, the technical evaluation is worth more. In this section, you'll see the different entries based on what you're being scored on. The categories are repeated lines based on your Section 4 submissions.

Financial evaluations are often scored independently of the technical evaluation. This way, we can assess the technical components of your bid without financial bias. We then separately score the financial submission and add the two together. This helps us determine the best overall value for our procurements. As you prepare your financial response, you need to keep in mind that you are in competition with other proponents. That means you'll need to present your best offer. As the Section 4.6 guidance stipulated, make sure your bid doesn't short-change your business nor overshoot your margins, making your bid uncompetitive. Contracts are, by their nature, a relationship of two parties. Provide your best offer that makes sense for your business and we'll select a business that best fulfills our requirements.

A quick note on how the evaluation is done: usually there is a small team of subject experts and internal stakeholders who evaluate the responses, with Strategic Procurement Services facilitating the process to ensure fairness. Evaluators carefully examine your responses with the requirements and assign a value based on the points in the section. These evaluations are done independently and are scored on the merit of the response rather than ranking responses. So, all proponents could, in theory, score 10/10 on a section if all responses meet and exceed the requirements laid out in the tender.

9. Acknowledgements

IMPORTANT: Ensure you submit this section or else your bid could be deemed non-compliant.

The bottom-right corner of this section includes a signature and title area which says, “I have the authority to bind the corporation”. This must be completed by an authority figure in your organization in order to enter into a contract with York.

10. Conclusion

We hope that this guidance will help you better navigate the open, competitive procurement process at York University. We wish you the best of luck as you formulate your bid response. If there is any other information you'd like covered on this topic, please reach out to Brent Brodie at bbrodie@yorku.ca. Please note that we cannot respond to specific questions about active tenders.

Moreover, please be aware that this document pertains only to procurements over \$121,200 (pre-tax). The University has separate processes for lower-tiered purchases. Please look at some of the other tools in the York U Social Procurement toolbox for ways you can participate in those procurements at York.

