How to Prepare a Bid

Ministry of Government and Consumer Services
Objectives of Today’s Webinar

- Create awareness of the rules around government procurement in Ontario
- Understand the vendor’s role in the public procurement process
- Help you to respond to business opportunities with Ontario
Ontario Government Procurement Facts
Governance Framework for Procurement

ONTARIO’S PROCUREMENT DIRECTIVES

TRADE AGREEMENTS

OTHER LEGISLATION

LAWS OF COMPETITIVE BIDDING

& CORPORATE POLICIES
In Canada, the procurement process is governed by the Contract A/Contract B framework established by the Supreme Court of Canada.

“Contract A” or the “bidding contract” is the name given to the contract that comes into existence between a bidder and a purchaser upon the submission of a compliant bid in response to a procurement document.

A separate Contract A is formed between the purchaser and each compliant bidder.

“Contract B” or the “performance contract” is the contract that is awarded and which comes into existence upon the acceptance by the purchaser of the winning bid. The ministry is considered the purchaser in the Contract A/Contract B framework.
Formation of a Procurement Contract in Ontario

1. The Province issues procurement document

**Invitation** = non-binding on the Province until compliant submission by bidder is received

2. Bidder Submits a Bid

**Offer** = Contract A ("Bidding contract") is created between the Province and every compliant bidder upon closing.

3. The Province selects best Offer

**Acceptance** = Contract B created between the Province and selected bidder.

4. Bidder Performs Contract B

Contract A with all other bidders ends. Traditional “Laws of Contract” govern Contract B.
Duties of the Purchaser

Since “Contract A” is a legal contract between the purchaser and each compliant bidder - certain legal duties, express and implied, rest on the purchaser and on the bidder.

Duties of the purchaser include:

- Disclose all material information like deliverable and terms and conditions
- Reject non-compliant bids
- Run a fair competition
- Award the contract to the winning bidder
- Award the contract as tendered
Duties of Bidders

Certain legal duties (express and implied) also rest on the bidder:

• No counteroffers

• The bidder’s bid will be irrevocable for a set period of time

• Once selected, the highest-ranked bidder is required to perform Contract B
Improving the Process

“Access to and knowledge of Ontario government business opportunities”

“Ability to develop quality proposals to win business”

“How to develop a good response?

“Want to spend less time developing responses to procurement opportunities”

“Ability to move on to other opportunities sooner”

Long, complicated procurement documents
The Solution: Request for Bids (RFB) Template

- Single, streamlined procurement template that can be used for both tenders and proposals. Allows for differences in evaluation processes, as appropriate.
RFB: Highlights – What’s in it for the vendor?

- Template structure and design is more logical and user-friendly
- Key details and dates are included up front
- Terms and conditions are consolidated into a single section
- Streamlined Form of Offer reduces risk of bidder error
- New forms set clear expectations and help structure bidders’ responses
**Procurement Abstract**

Procurement abstracts are the first page vendors can see.

They contain key information such as:

- **a.** A summarized description of the goods or services
- **b.** Key dates and contract lengths
- **c.** Who needs the services
### Part 1: Qualification Envelope (1)

<table>
<thead>
<tr>
<th><strong>QUALIFICATION ENVELOPE</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.1 Procurement Details</strong></td>
</tr>
<tr>
<td><strong>1.1.1 Information for Bidders</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>1.1.10 RFB Closing Date</strong></td>
</tr>
<tr>
<td><strong>1.1.11 Information Session</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>1.1.12 Site Meeting</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>1.1.15 Period for which bids are irrevocable after RFB Closing Date</strong></td>
</tr>
</tbody>
</table>

- Key details are included up front and are in one place
- Allows vendors to quickly determine whether or not a particular procurement opportunity may be suitable for them
The purpose of the Qualification Envelope is to inform the vendor what we’re looking for, and, importantly, to ensure the vendor is capable of providing it.

One of the tools to ensure you can meet our needs is the Mandatory Eligibility Requirements Section (if the buyer needs it for the procurement)

Questions asked of buyers in this section are typically yes/no type (although other question methods are possible) e.g, if a question asks if you have project management experience, a yes response may drop down a box asking how many years.
Part 1: Qualification Envelope (3)

<table>
<thead>
<tr>
<th>1.4</th>
<th>Evaluation Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>There are typically three stages in the evaluation process:</td>
<td></td>
</tr>
<tr>
<td>• Stage 1 – Evaluation of Qualification Response and Mandatory Requirements</td>
<td></td>
</tr>
<tr>
<td>• Stage 2 – Technical Response Evaluation (rated requirements)</td>
<td></td>
</tr>
<tr>
<td>• Stage 3 – Commercial Response Evaluation (pricing)</td>
<td></td>
</tr>
</tbody>
</table>

For more complex procurements, the evaluation process may also include additional stages such as an interview/demonstration stage and/or review of references. In this case, adjust the wording in sections below and insert the stage(s) as a new row in between the Technical Response Evaluation and the Commercial Response Evaluation.

For less complex procurements, such as commodity items, the evaluation process may also include fewer stages (e.g. price may be the only factor evaluated after Stage 1 – Qualification Response and Mandatory Requirements).

- The RFB will describe how each bid will be evaluated
- The RFB can be used for:
  - “price only” – as in the traditional Request for Tenders, or
  - “price plus other factors” – as in the traditional Request for Proposals
- When used for price only, the RFB will have only two parts – Qualification Envelope and Commercial Envelope
Part 2: Technical Envelope (1)

TECHNICAL ENVELOPE

Response Types to Bidder Questions Bidder questions in the Technical Envelope should address rated requirements. There are eight question types, each of which allows a Bidder to respond to the question in a different way:

1. **Yes/No** – The response can be selected as Yes or No
2. **Options List** – This provides a list of responses for a single option to be selected
3. **Multi Choice Options List** – More than one response can be selected from a list
4. **Text** – Allows a text response of up to 2000 characters to be entered
5. **Numeric** – The response entered must be strictly numeric
6. **Date** – This question type requires a date in the dd/mm/yyyy format
7. **Attachment** – The response will require an attachment to be uploaded

Evaluation - Increasing efficiency through automation:

For rated criteria, invest time drafting closed-ended questions in the Technical Envelope to take advantage of automated scoring. Automation saves you time and effort by reducing evaluation tasks by minimizing the need to read attachment responses and reduces the effort needed to compile the final evaluation summary.

Open-ended questions require manual evaluation which can lengthen the evaluation time. Attachments should be avoided, and must always be carefully managed. Open-ended questions are only appropriate when you cannot define a specific response(s).

"Open-ended" Questions

- e.g. "what type of certification do you have?"
- Must be evaluated manually
- Takes longer to evaluate

"Closed-ended" Questions

- e.g. "Do you have certificate A?", "Do you have certificate B?"
- Can be evaluated automatically
- Points can be assigned to each response option
- Saves time during evaluation

- Not all procurements will have a technical envelope
- It’s this section that may cause vendors the most questions, and the most difficulty completing the bid
- Technical sections are where we base our “Value for Money” procurement decisions
- These sections may be worth 70% to 80% of your bid
Part 2: Technical Envelope (2)

Not all questions need to be closed-ended

Subjective evaluation areas may also be included depending upon the needs of the end-user, the skill of the buyer, and the complexity of the procurement

Depending upon how the question is formatted, the system may still be able to automatically evaluate the response, with human review

<table>
<thead>
<tr>
<th>#</th>
<th>Question Title</th>
<th>Question or Description</th>
<th>Question Type</th>
<th>Points allocated</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.2</td>
<td>Proposed Approach</td>
<td>Provide details about your proposed approach to provide the goods or services listed in the Deliverables. Please detail your proposed approach in delivering each of the Objectives (described in the Deliverables of this RFB) identified in this section.</td>
<td>Yes/No; Numeric; Options List; Multiple-Choice; Option List; Text; Date; Attachment;</td>
<td>[insert points allocated]</td>
</tr>
<tr>
<td>2.2.1</td>
<td>Objective 1</td>
<td>[Insert description and question]</td>
<td>Yes/No; Numeric;</td>
<td>[insert points allocated]</td>
</tr>
</tbody>
</table>
# Part 2: Technical Envelope (3)

<table>
<thead>
<tr>
<th>2.3</th>
<th>Capabilities</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>[Insert maximum score possible for the section] Points</td>
</tr>
</tbody>
</table>

## 2.3.1 Capabilities
- Provide details about your capability (experience and/or qualifications) to provide the goods or services listed in the Deliverables.  
- Yes/No; Numeric; Options List; Multiple-Choice; Option List; [Insert points allocated]

## Roles and Responsibilities
- The roles and responsibilities of the Bidder and any of its agents, employees and sub-contractors who will be involved in providing the Deliverables, together with the identity of those who will be performing those roles and their relevant respective expertise.  
- Yes/No; Numeric; Options List; Multiple-Choice; Option List; Text; Date; [Insert points allocated]

## Work Plan
- A work plan which describes how the Bidder will provide the Deliverables within the schedule and milestones that incorporates an organizational chart indicating how the Bidder  
- Yes/No; Numeric; Options List; Multiple-Choice; Option List; [Insert points allocated]
### Bidder Instructions for Commercial Envelope

<table>
<thead>
<tr>
<th>Points</th>
<th>3.1.1 Bidder Instruction</th>
<th>Pricing shall be provided in Canadian Funds, inclusive of all applicable duties and taxes, except Harmonized Sales Tax (HST).</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.1.2 Bidder Instruction</td>
<td>Pricing quoted by the Bidder shall be all inclusive and shall include all labour and materials, travel and carriage costs, insurance costs and all other overhead including but not limited to any fees or other charges required by law. Harmonized Sales Tax (HST) shall be itemized separately.</td>
<td></td>
</tr>
<tr>
<td>3.1.3 Bidder Instruction</td>
<td>A Bid that includes conditional, optional, contingent or variable rates that are not expressly requested in the Commercial Envelope may be disqualified.</td>
<td></td>
</tr>
</tbody>
</table>

[Provide a copy or the text of your Rate Bid Form].

### Part 3: Commercial Envelope

- The commercial envelope is where we ask for your pricing
- The scoring value here is determined by the buyer and end user
- This area often requests a spreadsheet be completed we call a Rate Bid Form
- This is important – when we ask for pricing we will demand all vendors bid the same way
Where do I find Procurement Opportunities?

On the ONTARIO TENDERS PORTAL

In 2014, **BravoSolution** became Ontario’s new designated electronic tendering service provider replacing MERX Networks

- Services include access to Ontario government open procurement opportunities such as Requests for Bids for goods or services

- Electronic submission of bids is being implemented

- Vendors will no longer be required to purchase a subscription to access and review procurement documents. Vendors can read all our procurement documents free of charge, prior to deciding whether or not to bid.

- The new electronic tendering service is available at [ontario.ca/tenders](http://ontario.ca/tenders)
OTP Main Page

**Ontario Tenders Portal**

**USER LOGIN**
- Username:
- Password:
- Go

**Forgot your password?**

**PUBLIC SECTOR OPPORTUNITIES**
- To View and Search:
- Current Opportunities
- Past Opportunities
- Global Opportunities

**SUPPLIER REGISTRATION**
- Looking for new business with Ontario Public Sector?
- Register at no cost to receive email alerts for opportunities tailored to your business
- New user? Register now!

**About Ontario Tenders Portal**
**Vendor Registration Instruction**
**Supply Chain Ontario Ministry of Government and Consumer Services**

For Technical Support contact: etenderhelp_CA@bravosolution.com or Toll Free 866 722 7390 | Direct 484 335-4586
Registration Page

Registration Data

Organization Details

- Organization Name
- Address
- City
- Province/State
- Postal Code/Zip Code
- Country
- Main Organization Phone Number
- Organization Fax Number
- Web site
- Organization Legal Structure
- Company Registration Number
- HST Number
- Dun & Bradstreet
UNSPSC Selection Screen
All opportunities are available to the public, but you can only submit responses once you have registered as a Supplier.
<table>
<thead>
<tr>
<th>Organization</th>
<th>Project Reference</th>
<th>Project Title</th>
<th>Work Category</th>
<th>Listing Expiry Date (dd/mm/yyyy hh:mm)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government of Ontario</td>
<td>OSS_00590101</td>
<td>Internet Provisioning Services</td>
<td>Other</td>
<td>30/05/2016 11:00</td>
</tr>
<tr>
<td>Government of Ontario</td>
<td>OSS_00581935</td>
<td>Steep Rock Investigation of Soil &amp; Groundwater Contamination Remediation Options</td>
<td>Other</td>
<td>30/05/2016 11:00</td>
</tr>
<tr>
<td>Government of Ontario</td>
<td>OSS_00594488</td>
<td>Lease of One (1) High Capacity Printer and Service Maintenance</td>
<td>IT</td>
<td>30/05/2016 11:00</td>
</tr>
<tr>
<td>Government of Ontario</td>
<td>OSS_00578610</td>
<td>Corridor User Surveying and Data Collection High-Occupancy Toll (HOT) Pilot</td>
<td>Other</td>
<td>30/05/2016 11:00</td>
</tr>
<tr>
<td>Government of Ontario</td>
<td>OSS_00591246 / 1148</td>
<td>Weekly School Bus Transp Serv for Special Needs Students for Prov/Dem Schools</td>
<td>Other</td>
<td>30/05/2016 11:00</td>
</tr>
<tr>
<td>Government of Ontario</td>
<td>OCWA160512-BLOWER</td>
<td>Blower Package</td>
<td>Other</td>
<td>30/05/2016 12:00</td>
</tr>
<tr>
<td>Government of Ontario</td>
<td></td>
<td>MTO Demo 2 Properties</td>
<td>Other</td>
<td>31/05/2016 11:00</td>
</tr>
<tr>
<td>Toronto Community Housing</td>
<td>RFP 16137</td>
<td>RFP 16137 - Domestic Water Supply and Sanitary Plumbing Systems Replacement at G</td>
<td>Other</td>
<td>31/05/2016 11:00</td>
</tr>
<tr>
<td>Toronto Community Housing</td>
<td>RFP 16151</td>
<td>RFP 16151 - Domestic Water and Sanitary Piping Risers Replacement at Islington</td>
<td>Other</td>
<td>31/05/2016 11:00</td>
</tr>
<tr>
<td>Toronto Community Housing</td>
<td>RFP 16104 DWH System Upgrade @ 1-15 Field Sparroway and 2-10 Tree Sparroway</td>
<td>Other</td>
<td>31/05/2016 11:00</td>
<td></td>
</tr>
<tr>
<td>Toronto Community Housing</td>
<td>RFP 16175</td>
<td>RFP 16175 Preventive Maintenance Services, Demand Repairs For Fan Coil and PTAC</td>
<td>Other</td>
<td>31/05/2016 11:00</td>
</tr>
<tr>
<td>Toronto Community Housing</td>
<td>RFP 16176</td>
<td>RFP 16176 Replacement For Residential Furnaces and Domestic Hot Water</td>
<td>Other</td>
<td>31/05/2016 11:00</td>
</tr>
<tr>
<td>Toronto Community Housing</td>
<td>RFP 16177 PTAC (Packaged Terminal Air Conditioner) Replacement</td>
<td>Other</td>
<td>31/05/2016 11:00</td>
<td></td>
</tr>
<tr>
<td>Toronto Community Housing</td>
<td>RFP 16174 Preventive Maintenance Services, Demand Repairs For Furnaces and DHW</td>
<td>Other</td>
<td>31/05/2016 11:00</td>
<td></td>
</tr>
<tr>
<td>Government of Ontario</td>
<td>AIS-0862</td>
<td>Laundry Serv at St. Lawrence Valley &amp; Correctional Treatment &amp; Brockville Jail</td>
<td>Other</td>
<td>31/05/2016 11:00</td>
</tr>
<tr>
<td>Government of Ontario</td>
<td>OSS_00586225</td>
<td>Real Estate Appraisal Services</td>
<td>Other</td>
<td>31/05/2016 11:00</td>
</tr>
<tr>
<td>HMMS</td>
<td>HMMS02514</td>
<td>HMMS02514 - Ophthalmic Ultrasound A Scan Unit</td>
<td>Other</td>
<td>31/05/2016 12:00</td>
</tr>
</tbody>
</table>
The “RFx Abstract” allows you to identify important details about the RFx including **Project Categories** that help you select the best opportunities for your Organization.

Click the “Express Interest” button to become a Plan Taker.
Tips for a Stress Free Tender

• Read all supporting documentation thoroughly

• Always respond at least a day earlier than the close date

• Use the secure messaging tool

• Only upload attachments when requested

• Answer all relevant questions

• Follow all instructions

• Keep your username and password safe

• Save your work regularly!

OTP Technical Support

8:00 am to 8:00 pm ET - Monday to Friday

Toll Free phone:  866.722.7390
Direct Phone:     484.335.4586

eTenderhelp_CA@bravosolution.com
Submitting a Compliant Bid

Submitting a compliant bid in response to a procurement opportunity binds you to the terms and conditions in the procurement document, including the terms and conditions in the Form of Agreement.

All bids must be received prior to the closing date and time. The Ontario Tenders Portal will close bidding at exactly the date and time stated in the Qualifications Envelope.

When in the system completing your bid, we recommend you hit the “submit” button 15 minutes or more before bid close to ensure all the system requirements and sending procedures are completed in time. Keep the confirmation page for your records.
What if I am unsuccessful?

Bidder Debriefings

The final step in the procurement process is to offer a debriefing

- Vendors are entitled to know why their bid was not successful. Vendors who participate in procurements valued at $25,000 or more are offered an opportunity for a debriefing

- Debriefings are valuable to bidders as they offer the opportunity to learn the strengths and weaknesses of their bids. The objective of a debriefing is to help bidders learn how to improve the quality of their bids in the future. It is not to challenge the procurement process

The procurement process concludes when a signed agreement is in place and all bidder debriefings are complete
Ten Best Practices for Bidding

1. **Read** the procurement document in its entirety including the terms and conditions and addenda thoroughly.

2. **Check** the timetable for events such as a site visit, deadline for questions, closing date, time and location.

3. **Ask** questions before the end of the question and answer period to ensure that you understand what is required. Only communicate with the assigned procurement contact.

4. **Meet** all mandatory requirements, e.g., project experience, references, etc.

5. **Respond** to all included rated requirements.

6. **Describe** how you will provide the goods/services – do not just copy the terms of reference. Ensure that you comply with any accessibility requirements contained in the procurement document.

7. **Meet** all submission requirements, insurance, security clearance, etc.

8. **Organize** your response so that it is complete. This is advice applies more to low value invitational procurements and to paper-based.

9. **Conduct a quality review** of your responses before submitting and verify your pricing calculations. Marks are not taken away for typos and spelling errors.

10. **Ask** the contact for a debriefing after the contract has been awarded.

For more information visit: [www.ontario.ca/supplychain](http://www.ontario.ca/supplychain)
Ministry of Government and Consumer Services: Supply Chain Ontario Internet Website (1) – ontario.ca/supplychain

Ministry Programs

Doing Business with the Government

› SCO Home
› Information for Vendors
› Information for Buyers
› Events and Seminars
› VOR Arrangements
› GreenFIT
› BPS Supply Chain Secretariat
› Procurement Policies & Trade

Supply Chain Ontario

FOR VENDORS

Sell Your Products and Services To The Public Sector Market

The Ontario Government spends billions of dollars each year on goods, services and construction from 51,000 vendors, most of which are located in Ontario. Learn how to become one of these vendors.

eTendering Registration

FOR PUBLIC SECTOR BUYERS

Broader Public Sector Supply Chain Secretariat

Access Ontario Government Vendor of Record Program

The Ontario Government has contracted with vendors to supply a variety of goods and services which are accessible to public sector buyers in Ontario.

Register As Buyer | Login
Additional Information

Resources and Contact Information for:
Ministry of Government and Consumer Services
Ontario Shared Services
Supply Chain Ontario
Website: ontario.ca/supplychain
Email: doingbusiness@ontario.ca

“© Queen’s Printer for Ontario, 2016”