

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

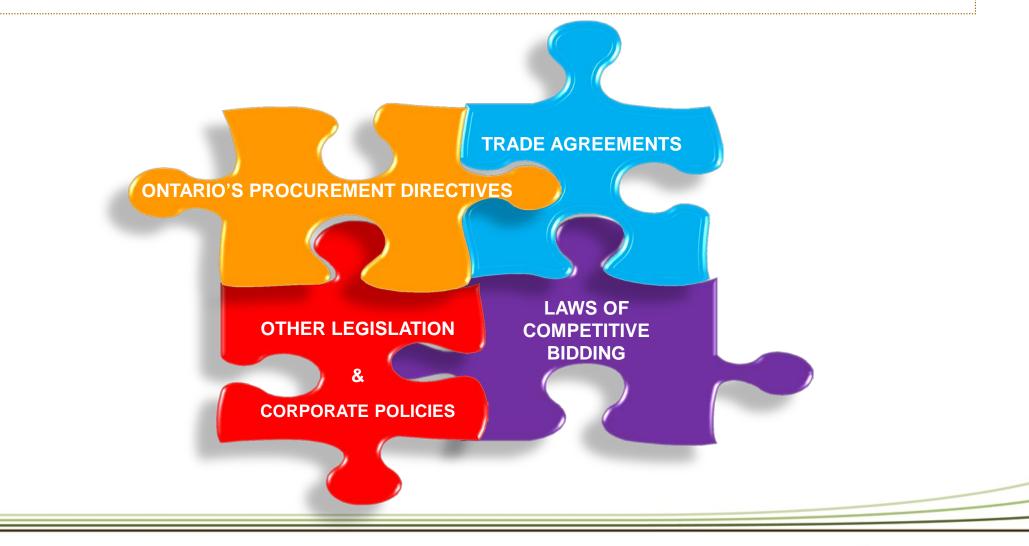


Ontario Government Procurement Facts





Governance Framework for Procurement





Laws of Competitive Bidding

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

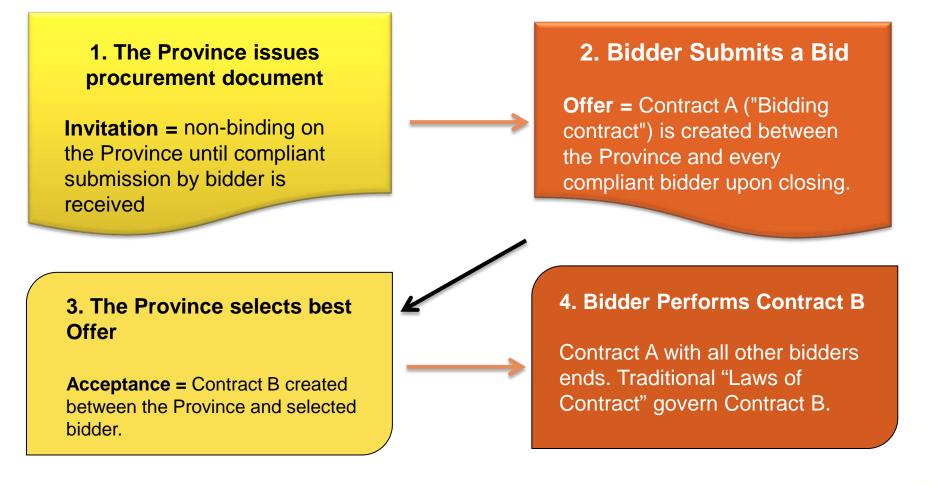
"**Contract A**" or the "bidding contract" is the name given to the contract that comes into existence between a bidder and a purchaser upon the submission of a compliant bid in response to a procurement document

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





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"

"Want to spend less time developing responses to procurement opportunities"

> "Ability to move on to other opportunities sooner"

> > How to develop a good response?

"Ability to develop quality proposals to win business"

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

Project: tender_3437 - Learning and Training Services Project Reference: OSS_00536904	
Dogin or Register to Participate	
Project Details	
Project Code	tender 3437
Project Title	Learning and Training Services
Project Reference	
Project with Multiple Lots	Yes
Project Type	Services
Project Categories	42232500 - Educational or reference software 46211500 - Workplace safety training aids and materials 60101600 - Educational certificates or diplomas 60105300 - Career education instructional materials 80161500 - Management support services 80171800 - Media relations services 80172000 - Professional communication services 80172100 - Issues and crisis management services 8017100 - Prechnical writing 82111500 - Technical writing 82111500 - Creative writing 86111500 - Adult education 86111600 - Adult education 86121700 - University and colleges 86122000 - Management education and training services 86132000 - Management education and training services 86132100 - Training planning, facilitation and delivery services 86141700 - Educational technology
Opportunity Details	
Detailed Description	Supply Chain Ontario (SCO) of the Ministry of Government and Consumer Services (the Ministry) for the Government of Ontario is issuing this Request for Bids (RFB) to prospective bidders for Learning and Training Services. This procurement will combine the following existing VOR arrangements: - Learning and Training Services, OSS 00154215; and - Learning and Training for I&IT Professionals, OSS_00276296 The objective of this RFB will be to establish a multi-vendor enterprise-wide Vendor of Record (VOR) arrangement for the provision of Learning and Fraining Services, OSS_00536904 for the Ontario Public Services (OFS) which includes the following categories: Leadership Development Programming, Giptal Learning, Communications Courses Programming and General IT Learning and Training Services.
Scope of Work	01
Work Category	Other
Procurement Route	
Opportunity First Publishing Date (dd/mm/yyyy hh:mm)	18/01/2016 13:46
Opportunity Last Publishing Date (dd/mm/yyyy hh:mm)	04/02/2016 15:32
Listing Expiry Date (dd/mm/yyyy hh:mm)	21/03/2016 14:00
Estimated Contract Start Date (dd/mm/yyyy) Estimated Contract Duration	The term of the Agreement is for five (5) years with an additional two (2) year extension option. The adjusted value for this VOB arrangement is approximately \$50(2) year extension option.

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



Pontario

Part 1: Qualification Envelope (1)

QUALIFICATION ENVELOPE

1.1	Procurement Details			
1.1.1	Information for Bidders	Download and read the following attachments that form		
		part of the Request for		
		Bids ("RFB") before submitting your Bid:		
		1) RFB Attachment #1 - Definitions;		
		2) RFB Attachment #2 - Form of Agreement;		
		3) RFB Attachment #3 - The Deliverables;		
		4) RFB Attachment #4 - Terms and Conditions; and		
		5) RFB Attachment #5 - BravoSolution System		
		Instructions		
1.1.10	RFB Closing Date	Insert full date and time 00:00. Time should be in 24-		
		Hour clock format.]		
1.1.11	Information Session	[Select of the following Options:		
		• YES, MANDATORY;		
		• YES, OPTIONAL;		
		NO; [Insert full date and time 00:00. Time should be in		
		24-Hour clock format.]		
1.1.12	Site Meeting	[Select of the following Options:		
		• YES, MANDATORY;		
		• YES, OPTIONAL;		
		• NO; [Insert full date and time 00:00. Time should be in		
		24-Hour clock format.]		
1.1.15	Period for which bids	[Insert irrevocable period. Template assumption a		
	are irrevocable after	period of 120 days] days		
	RFB Closing Date			

- 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



Part 1: Qualification Envelope (2)

1.2 The Deliverables

1.2.1	The Deliverables	For section 1.2 of the RFB, please refer to
		Attachment#3 – the Deliverables, of the RFB.

1.3 Mandatory Eligibility Requirements

Check box if clause <u>not</u> required

This section is **optional** and is not required for all procurements. It only applies if specific mandatory eligibility requirements are required before a Bid can be accepted.

Response Types to Bidder Questions

Bidder questions in the Qualification Envelope should address mandatory requirements and can only be answered using a Yes/No question type.

ſ	1.3.1	Mandatory Eligibility	A Bidder's eligibility must be demonstrated		
		Instructions	before a Bid may be accepted. If th		
			Bidder has not demonstrated eligibility to a		
			specific requirement, the Ministry reserves		
			the right to disqualify the Bidder.		
ſ	1.3.2	[Insert Title]	[Insert Requirement]		
		(max 256 characters)	[Insert question related to requirement]		

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)

1.4 Evaluation Process

There are typically three stages in the evaluation process

- Stage 1 Evaluation of Qualification Response and Mandatory Requirements
- Stage 2 Technical Response Evaluation (rated requirements)
- Stage 3 Commercial Response Evaluation (pricing)

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).

1.4.1	Overview of the Evaluation
	Process
1.4.2	Stage 1 - Evaluation of
	Qualification Response and
	Mandatory Requirements
1.4.3	Stage 2 - Technical
	Response Evaluation
1.4.4	Stage 3 - Commercial
	Response Evaluation
1.4.5	Cumulative Score and
	Selection of Highest
	Scoring Bidder
1.4.6	Process to Sign the Agreement
	·

- 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)

[Insert maximum score possible for the section] Points # **Question Title Question or Description** Question Points Type allocated 2.2.1 Proposed Provide details about your Yes/No; [Insert Approach proposed approach to provide points Numeric: the goods or services listed in allocated] the Deliverables. **Options** List; Multiple-Please detail your proposed Choice; approach in delivering each of Option List; the Objectives (described in the Deliverables of this RFB) Text; identified in this section. Date: Attachment: [Insert additional objectives, if required] [List, in additional sections, other information you will need the Bidder to provide so you can determine the quality and effectiveness of the proposed approach, if appropriate] 2.2.2 **Objective 1** [Insert description and question] Yes/No; [Insert points [Insert Question Numeric: allocated]

Proposed Approach [Modify title as needed]

- 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



2.2

Part 2: Technical Envelope (3)

2.3	Capabilities					
Flue e e ret						
linsen	rt maximum score possible for the section] Points					
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-	[Insert points allocated]		



Part 3: Commercial Envelope

COMMERCIAL ENVELOPE:

3.1	Bidder Instructions for Commercial Envelope				
[Maxin	[Maximum score possible for the Commercial Envelope] Points				
3.1.1	Bidder InstructionPricing shall be provided in Canadian Funds, inclusive of all applicable duties and taxes, except Harmonized Sales Tax (HST).				
3.1.2	Bidder Instruction	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.			
3.1.3	Bidder Instruction	A Bid that includes conditional, optional, contingent or variable rates that are not expressly requested in the Commercial Envelope may be disqualified.			

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

- 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 <u>ontario.ca/tenders</u>



OTP Main Page

	ers Portal	
Username:	PUBLIC SECTOR OPPORTUNITIES To View and Search: Current Opportunities	SUPPLIER REGISTRATION Looking for new business with Ontario Public Sector?
	Past Opportunities Global Opportunities	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 eTender	help_CA@bravosolution.com or Toll Fre	e 866 722 7390 Direct 484 335-4586



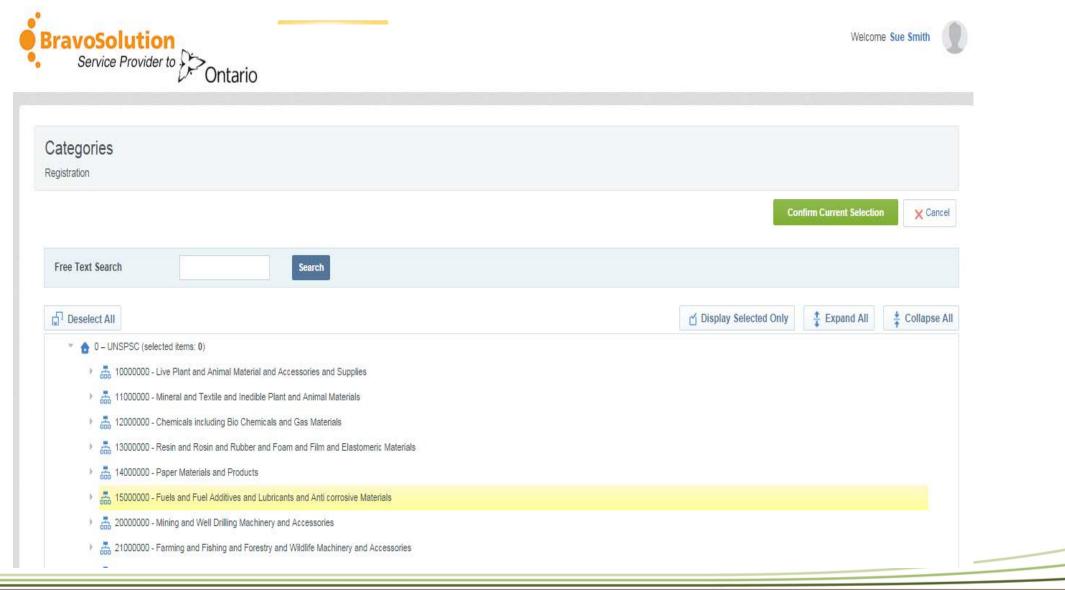
Registration Page



				Parama - T	
				Save	🔀 Close
			High contrast stylesheet	Switch to Standard Controls	🕜 Reset
CANADA	▼ Go				
	CANADA	CANADA V Go	CANADA Concernation of the second sec		High contrast stylesheet Switch to Standard Controls Image: Switch to Switch to Switch to Standard Controls Image: Switch to Switch



UNSPSC Selection Screen





Supplier Landing Page

All opportunities are available to the public, but you can only submit responses once you have registered as a Supplier.

Ontario Tenders Portal

BravoSolution Service Provider to



USER PROFILE "Projects" with our Buyers. Manage Your Profile Manage Password opportunities. Manage Users Open to All Suppliers" MY PROCUREMENT ROJECTS Pojects response fee. Opportunities Open to All Suppliers RFI Open to All Suppliers My RFI

RFx Open to All Suppliers

- My RFx
- Payment
- Supplier Guides and Information

Welcome to the Ontario Government Tender Portal

This service provides a secure and efficient means for you to engage in procurement

The "Opportunities Open to All Suppliers" page allows you to review open tender

New procurement projects are available by clicking on "RFI Open to All Suppliers/RFX

Once you have expressed interest in a new procurement it will move to your "My RFI / My RFx" page, where you can download any documentation and submit your response.

Prior to response creation you can "Make Payment" to submit your annual or one time

A free helpdesk is available to support you in using this service. If you require any assistance then please contact the helpdesk as soon as possible.



Opportunities Screen

Select a Filter		Go			
	Organization	Project Reference	Project Title	Work Category	Listing Expiry Date (dd/mm/yyyy hh:mm)
1	Government of Ontario	OSS_00590101	Internet Provisioning Services	Other	30/05/2016 11:00
2	Government of Ontario	OSS_00581935	Steep Rock Investigation of Soil & Groundwater Contamination Remediation Options	Other	30/05/2016 11:00
3	Government of Ontario	OSS_00594488	Lease of One (1) High Capacity Printer and Service Maintenance	IT	30/05/2016 11:00
4	Government of Ontario	OSS_00578610	Corridor User Surveying and Data Collection High-Occupancy Toll (HOT) Pilot	Other	30/05/2016 11:00
5	Government of Ontario	OSS_00591246 / 1148	Weekly School Bus Transp Serv for Special Needs Students for Prov/Dem Schools	Other	30/05/2016 11:00
6	Government of Ontario	OCWA160512-BLOWER	Blower Package	Other	30/05/2016 12:00
7	Government of Ontario		MTO Demo 2 Properties	Other	31/05/2016 11:00
8	Toronto Community Housing	RFP 16137	RFP 16137 - Domestic Water Supply and Sanitary Plumbing Systems Replacement at G	Other	31/05/2016 11:00
9	Toronto Community Housing	RFP 16151	RFP 16151 - Domestic Water and Sanitary Piping Risers Replacement at Islington	Other	31/05/2016 11:00
10	Toronto Community Housing		RFP 16184 DHW System Upgrade @ 1-15 Field Sparroway and 2-10 Tree Sparroway	Other	31/05/2016 11:00
11	Toronto Community Housing		RFP 16175 Preventive Maintenance Services, Demand Repairs For Fan Coil and PTAC	Other	31/05/2016 11:00
12	Toronto Community Housing		RFP 16176 Replacement For Residential Furnaces and Domestic Hot Water	Other	31/05/2016 11:00
13	Toronto Community Housing		RFP 16177 PTAC (Packaged Terminal Air Conditioner) Replacement	Other	31/05/2016 11:00
14	Toronto Community Housing		RFP 16174 Preventive Maintenance Services, Demand Repairs For Furnaces and DHW	Other	31/05/2016 11:00
15	Government of Ontario	AIS-0862	Laundry Serv at St. Lawrence Valley & Correctional Treatment & Brockville Jail	Other	31/05/2016 11:00
16	Government of Ontario	OSS_00585225	Real Estate Appraisal Services	Other	31/05/2016 11:00
17	HMMS	HMMS02514 - Ophthalmic Ultrasound A Scan Unit	HMMS02514 - Ophthalmic Ultrasound A Scan Unit	Other	31/05/2016 12:00



•••

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

BravoSolution Service Provider to Contario	Welcome ben naima	
RFx: rfx_4554 - economic assessment Project: tender_3107 - economic assessment Closing Date: 28/01/2016 01:30:00	Running	
Response status Response status No Response Prepared	Express Interest X Decide Later	Click the "Express Interest"
RFx Code rfx_4554 Detailed Description	Title economic assessment Type of Supplier Access RFx Open to All Suppliers	button to become a Plan
Response Currency CAN Buyer Organization Government of Ontario	Test RFx No Allow Suppliers to Respond by Consortium Yes	Taker
RFQ Attributes RFQ Type RFS (Request for Service)		



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:866.722.7390Direct 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

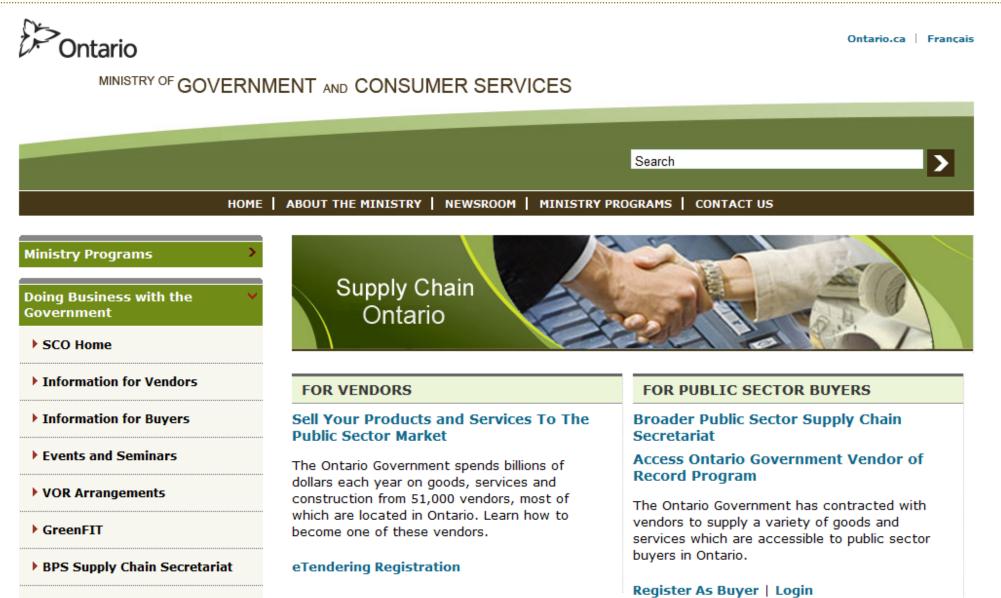
- **1. Read** the procurement document in its entirety including the terms and conditions and addenda thoroughly.
- 2. Check the timetable for events such as a site visit, deadline for questions, closing date, time and location.
- **3.** Ask questions before the end of the question and answer period 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

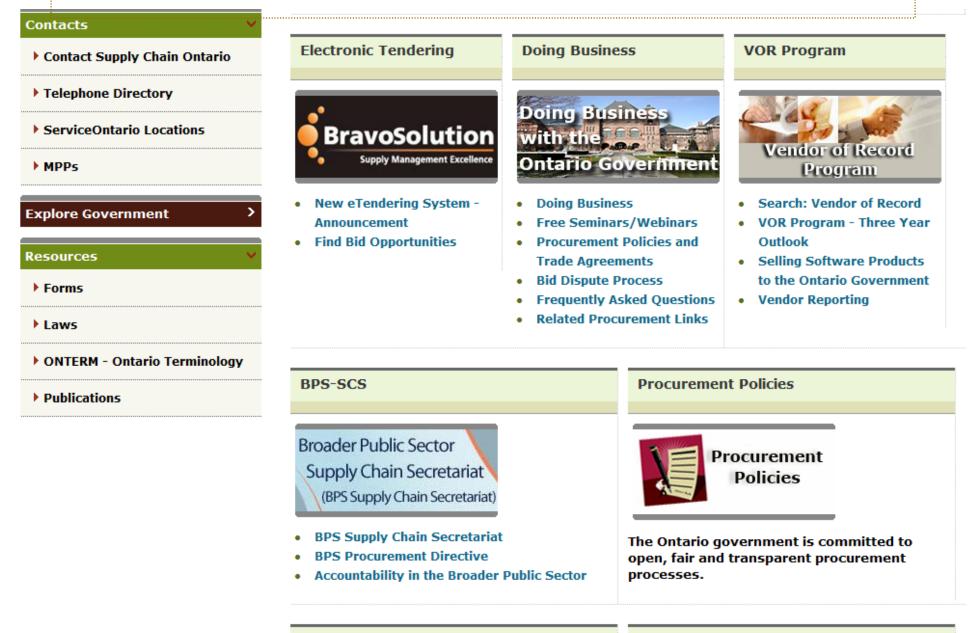


Ministry of Government and Consumer Services: Supply Chain Ontario Internet Website (1) – ontario.ca/supplychain



Procurement Policies & Trade

Ministry of Government and Consumer Services: Supply Chain Ontario Internet Website (2)



Other Dopular Dages

Related Links

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

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