



RFP/CONTRACT PROCEDURE

The process below is for a contract which is being put out to tender. If a sole source without tendering is desired, the process for requesting a sole source can be found in the Fiscal Policy.

An RFP is valuable because it offers a low-risk way to manage what can be a very complex process of soliciting bids, evaluating vendors and finally choosing the best option. It describes what you need. A good RFP also will describe the purpose and goal of the project and defines requirements.

WHAT COMPRISES A GOOD RFP?

a) Background – Keep it Brief

There's usually no need to provide paragraphs full of detail about the history of the organization. Refer to the CEMA where vendors can look up most of that information. Keep background info relevant to the project as it relates to the RFP.

b) Goals

The goals should focus more on what you're trying to achieve via the project than what you expect the end product to look like; this gives vendors more space to explore and share their creative approach to achieving your objectives.

c) Project Requirements

What requirements will your vendor be expected to adhere to during the execution of your project, e.g. launch dates, technology platform, legal clearances, etc.? The more detail you can provide here the better. This will help vet unqualified candidates as well as deliver more accurate estimates. The more assumptions you receive in your proposal, the harder it will be to compare apples-to-apples. The administrative information includes the deadline, to whom the RFP should be sent, and how you want the proposal received (fax, e-mail attachment, hard copy) and in what format (e.g., in Word, as a PDF document, etc.).

d) Vendor Expectations

What do you expect vendors to deliver in their proposal? If you don't specify the information you need from the vendor you'll end up getting a hodgepodge of information, some of which might be useful to you, most of which will be boilerplate. Share with the vendors your standards and process. List in order of priority the various factors, such as cost, experience, timelines, and other considerations.

e) Timeline

Provide a clear and reasonable timeline for the RFP process, and stick to it. Provide your vendors with enough time to prepare a proper presentation Outline dates for vendor question submissions, answers, proposal submission deadline, and vendor selection.

f) Budget

Should you share budget information in your RFP? This will depend on the complexity of the project and the expectations of deliverables. Understanding budget parameters will help potential vendors develop the best solution to meet your budget.

g) Questions

Always solicit questions from your potential vendor. No matter how well you've crafted your RFP, there will likely be information that was omitted or was unintentionally unclear. The initial Q&A session will also give you an opportunity to see whether your potential vendors have actually read and understood what you wrote in the RFP;



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if they've done their homework; and show how good they are at asking critical questions or bringing up insights that may never have occurred to you.

h) RFP Length:

Consider imposing a mandatory **page limit** for proposals, and tell vendors how many copies to send you.

RFP PROCESS:

1. The task group identifies the need for a specific piece of work from their approved work plan. Someone on the task group will take on the task of developing a Terms of Reference (ToR) for the project which will be the basis of a Request for Proposal (RFP).
2. The Working Group reviews and approves the final RFP. If edits are required by the WG, the task group will amend as directed.
3. The ToR is submitted to the Program Administrator. The PA inserts the information into the Request for Proposal template (the task group member may have already done this through developing the ToR). The RFP will specify how long bidding will be open. The period is usually between two and four weeks. The document must be submitted in Adobe PDF format.
4. Post the RFP on the CEMA website by sending to the webmaster. If the RFP references CEMA documents, either attach them, or put instructions of how the consultant can find them in the library.
5. Post the RFP on the Merx website. There is a link on our website which can be used by consultants to check the MERX site for open projects. If the task group has identified any consultants in particular they want to receive the RFP, email it to them, either in separate emails, or using the bcc function. You don't want consultants knowing which other consultants have received the RFP.
6. Receive proposals until the deadline, but do not share any of the proposals with anyone, including the task group, until the deadline for proposal submission as specified by the RFP.
7. If the quality of the proposals is poor, or, if the response is too low, the WG/TG may decide to extend the deadline, resubmit the RFP to attract more contenders, or resubmit the RFP after changes to the scope/requirements have been made. In this case, all contractors who submitted proposals must be notified in writing/email with the new plan and the rationale for the change.
8. After the deadline, send all proposals to the task group with a proposal evaluation form with around a week or two to review them. Schedule a 1 – 2 hour conference call at the end of the review period to review the proposals and decide on a consultant. The Task Group reviews the proposals using the CEMA Proposal Ranking Template.
9. When selecting a consultant, take into account the following:
 - The group must be able to defend their choice should the decision be challenged.
 - If there is a large discrepancy between proposals, communicate with the ED before finalizing your choice. Provide him with your recommendation.

Please note: All completed templates must be sent to the Operations Manager for storage.



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10. After the task group has selected a proposal, approval is needed from the WG to proceed with the contract. Email the WG with the winning proposal, a brief description of why the task group feels they are the appropriate consultant, and give a deadline of a week for them to respond. Given that you're not an expert on the piece of work that the proposal is for, your email should include a statement indicating anyone with questions should contact either the Chair, or the person who was tasked with developing the original ToR. (During the process of making a decision on the RFP and getting WG approval, you will likely field a lot of phone calls from consultants asking who was awarded the contract. Tell them that you are awaiting approval to proceed with a contract, and after that has been received you will email them with the results).
11. After WG approval has been received, you will write letters/emails to all of the consultants who submitted proposals using the RFP Bid Selection form in the PA folder. The consultants who did not win may request information on why they didn't win. You should keep your responses short – no explanations. Never provide information such as, "You didn't win because Golder put in a proposal with a budget that was \$100,000 less than yours." Do not make references to other proposals received.
12. While waiting to get necessary approvals, etc. send an email to Financial Administrator requesting a contract number. You must provide her with:
 - Contract title
 - Budgetted amount
 - Name of Consultant
 - Starting and ending date of contractFinancial Administrator will enter this information on the Reports Database, creating a new line in the workbook.
13. When you have all of the information necessary to put together a contract, using the proposal and the ToR, you fill in the contract template. There may be some information that you aren't sure about, such as a timeline for deliverables. Consult the Chair or the person who developed the ToR as necessary. Once completed, send to the Chair and Scientific Advisor for approval.
14. If additional funds are required to issue the contract beyond the budgeted amount, a budget amendment request must be submitted and approved before the contract can be initiated.
15. The contract terms must coincide with the terms outlined in the RFP.
16. Once you receive approval from the Chair and Scientific Advisor, email a PDF (not a .doc) copy of the contract to the consultant for review. (The consultant will often suggest changes to the standard contract clauses. These cannot be changed. They've been reviewed by a lawyer and any changes can change the legal meaning. On the slim chance that the consultant has a legitimate reason for wanting one changed, you must NEVER change them without prior approval from the Executive Director.)
17. Make any changes suggested by the consultant as long as they are clarifying details of the work and not the standard contract clauses. If there are changes beyond corrections of typos, send a copy to the Chair and Scientific Advisor again, highlighting the changes the consultant has requested. Give them a day or two to respond and indicate if they're okay with the changes.
18. You should now have a copy of the contract that has been approved by the Chair, the Scientific Advisor and the consultant. Send a PDF of the contract to the consultant. Specify that they need to print and sign three copies of the contract and that they must then mail all three copies to the CEMA office.



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19. Once the three copies are received, submit them for signing. Once all three have been signed, give them to the financial administrator. The destination of the three copies are:
- A copy which you would keep in your files
 - A copy for the contract filing cabinet
 - A copy will be mailed back to the consultant by Financial Administrator
20. Report reviewing:
- The task group reviews the draft report.
 - The task group requests revisions to the draft if necessary.
 - The working group reviews and approves the final draft report.