

## General Services - Fixed Price Request for Proposals (RFP) Template

The attached RFP template has been prepared by Contracted Services Section, Procurement Services, Service Alberta (“Procurement Services”) for use by Government of Alberta Departments in preparing an RFP for a **fixed price General Services** project. General Services includes consulting, project management, research, studies, report preparation, RFP and evaluation plan preparation, training, and service delivery. The Evaluation Plan is to be developed in parallel with the RFP. The RFP template, Evaluation Plan Template, and related tools including “Request for Proposals (RFP) Preparation Guidelines” and “Request for Proposal (RFP) Response Evaluation Process” are found at the following website address: <https://www.myagent.gov.ab.ca>

This template has been reviewed and approved by Legal Services, Alberta Justice for use by Government of Alberta Departments.

As this template will be updated from time to time, it is recommended that Departments visit the above referenced website to view the latest version of the template each time an RFP is to be developed.

The “RFP Administration Terms and Conditions” document posted on Alberta Purchasing Connection (“APC”) is incorporated into the RFP by reference. The document contains the RFP’s definitions and its terms and conditions. **Before drafting an RFP, Departments should review section 1 of the RFP Administration Terms and Conditions** to ensure the terminology is appropriately used throughout the RFP and the definitions are accurate. Should Procurement Services not be involved in the procurement process, references to “Procurement Services” will need to be changed by indicating in the RFP that these references are deleted and replaced with the appropriate Department name. References to “Service Alberta” would also be changed unless the procurement is for Service Alberta and/or the scope of services requires mention of Service Alberta.

**In preparing an RFP, Departments are asked to carefully consider the significance of identifying a requirement as mandatory. Identifying a requirement as mandatory means it must be met in a substantially unaltered form in order for the Proposal to receive consideration (i.e. if not it must be rejected). Therefore, the number of mandatory requirements in the RFP should be limited where possible. Consideration should be given to alternative approaches such as making requirements desirable and appropriately weighting and scoring the criteria to give sufficient credit. The use of minimum scoring thresholds to screen proposals is also a viable alternative, for example, Proposals which achieve a minimum of 50% of the total points for each rating category and a minimum overall rating of 65% of the total points for all rating categories will be considered.**

Italicized text is used in the template to guide Departments on the RFP structure and content. An overview of the RFP sections is as follows:

- RFP Cover Page – This is a standard cover page and **should not be modified** by the Department except for completing the appropriate areas. If Procurement Services is not involved in the procurement process, then references to “Contracted Services Section” and “Procurement Services”, and its address will need to be modified. The reference to “Service Alberta” would also be changed unless the procurement is for Service Alberta.
- Table of Contents – To be updated by the Department as necessary.
- Section 1.0 – This section contains standard text and **should only be modified** by the Department if the RFP Administration Terms and Conditions require modification based on project needs or if Procurement Services is not involved in the procurement.
- Section 2.0 – This section is to be completed by the Department. Recommended text is included in the template.
- Section 3.0 - To be completed by the Department.
- Section 4.0 – This section is to be completed by the Department and customized as appropriate to reflect the RFP criteria to be evaluated by the Department.
- Section 5.0 - Recommended and optional text has been provided in this section. This section should be carefully reviewed by the Department and modified to meet the Department’s needs. **The Vendor will be preparing its Proposal based on the information required by this section.** The Department should review the content of this section against the information and requirements contained in section 3.0 of the RFP so that requirements needing a response are reflected in section 5.0.
- Appendix A - The General Services Fixed Price Contract template from the following website <https://www.myagent.gov.ab.ca> should be inserted as Appendix A. Guidelines for completing the Contract are provided with the template. All changes to the Contract should be reviewed by Legal Services, Alberta Justice. Where Procurement Services is involved in the procurement process, changes to the Contract should not be made before consulting Procurement Services.
- Appendix B - Department to customize this pricing Appendix as appropriate for the project/required Services.
- Appendix C - This Appendix should be customized by the Department to include the deliverables for the project/required Services.
- Appendix D - The appropriate areas of this Appendix are to be completed by the Department.
- Appendix E - This Appendix includes the Evaluation Framework to be completed by the Department.

Appendix F - This Appendix includes sample RFP requirements/questions that may be used by the Department in completing section 5.0 of the RFP. This Appendix would not appear in the final RFP.

Additional appendices may be added to the RFP as required by the Department.

Where Procurement Services is involved in the procurement process, Departments are advised to consult with Procurement Services in the early stages of RFP preparation to discuss the RFP and contracting approach contemplated. Discussion of the approach early in the RFP development process will assist in identification of any potential issues that may require further discussion or research. Legal review of the completed RFP will be facilitated by Procurement Services.

# Government of Alberta ■

Procurement Services  
Contracted Services Section  
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Edmonton, Alberta  
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## **REQUEST FOR PROPOSALS (“RFP”) NUMBER XXXXX-XX**

**(INSERT NAME OF PROJECT)**

**(INSERT NAME OF DEPARTMENT)**

**RFP Issue Date:**

**RFP Closing 14:00:59 Alberta Time:**

**Contracting Manager:**

**Telephone: (780) 427-xxxx**

**Facsimile (780) 422-9672**

**Email:**

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## 1.0 GENERAL

### 1.1 Introduction

Vendors are invited to submit Proposals for the provision of the Services and Materials as specified in this RFP.

This RFP will be conducted with the objective of maximizing the benefit to Her Majesty, while offering Vendors a fair and equitable opportunity to participate.

Vendors are advised to pay careful attention to the wording used throughout this RFP. Failure to satisfy any term or condition of this RFP may result in an unacceptable Proposal.

Facsimile or digital Proposals in any form (e.g. diskette files, disk files, tape files, e-mailed files) will not be accepted.

Subject to the amendments specified below, the RFP Administration Terms and Conditions dated September 28, 2009 (“RFP Administration Terms and Conditions”) posted on Alberta Purchasing Connection (“APC”) form part of this RFP. Vendors by submitting a Proposal are deemed to have accepted the RFP Administration Terms and Conditions:

***Should the RFP Administration Terms and Conditions need to be amended further based on project needs, a listing of the appropriate changes should follow, for example:***

- *Section xxx of the RFP Administration Terms and Conditions is deleted, and a revised Section xxx is inserted as follows:*
- *Add the following to Section xxx of the RFP Administration Terms and Conditions:*
- *The following Section xxx is added to the RFP Administration Terms and Conditions:*

***When Procurement Services is not involved in the procurement process, the Department would make the following changes to the RFP Administration Terms and Conditions:***

- *All references to “Procurement Services” in the RFP Administration Terms and Conditions are deleted and replaced with “Alberta (insert Department name)”.*
- *Section 2.15 (d) of the RFP Administration Terms and Conditions is deleted and replaced with the following:*

*2.15 (d) Proposals must be sealed and clearly marked with the RFP’s number and RFP closing date and addressed as follows:*

*(Branch)*  
*(Division)*  
*(Department name)*  
*(Address)*  
*(City, Province, Postal Code)*

- *The definition of “Procurement Services” is deleted from section 1.0 of the RFP Administration Terms and Conditions.*

*The definition of “Service Alberta” should also be deleted if the procurement is not for Service Alberta., Procurement Services is not involved in the procurement process, and/or the scope of services does not require mention of Service Alberta. If deleting the reference, the appropriate wording would be as follows:*

- *The definition of “Service Alberta” is deleted from section 1.0 of the RFP Administration Terms and Conditions.)*

## **2.0 RFP PROCESS**

### **2.1 RFP Terminology**

Terminology used throughout this RFP is defined in the RFP Administration Terms and Conditions and Appendix A and as follows:

- **Alberta** *(insert the Department name – e.g. **Health**)* means Her Majesty the Queen in right of Alberta, as represented by the Minister of *(insert the Department name)*.
- **Department** means Her Majesty the Queen in right of Alberta, as represented by the Minister of *(insert the Department name)*.

*Insert additional definitions as required for the RFP.*

References to “Alberta *(insert Department name)*”, “Department”, “Government of Alberta”, “Her Majesty”, “Procurement Services” “Service Alberta”, and *(insert in alphabetical order any other descriptions of Her Majesty used in this RFP, for example “Government”)*, mean “Her Majesty the Queen in right of Alberta” and are only used for administrative purposes.

### **2.2 RFP Schedule of Events**

**RFP Issue Date:**

**Bidders’ Conference Date:** *(Optional)*

**RFP Closing Date:**

**Evaluation of Proposals:**

**Shortlist Presentations:**

### **Selection of Preferred Vendor:**

The above dates are subject to change at the sole discretion of Her Majesty.

### **2.3 Bidders' Conference (optional clause)**

A Bidders' Conference has been scheduled to provide an opportunity for clarification regarding this RFP's requirements, and to address any other issues with this RFP:

Date:

Time:

Location:

To facilitate comprehensive responses at the Bidders' Conference it is recommended that written questions be submitted to the Contracting Manager in advance of the Bidders' Conference.

Attendance at the Bidders' Conference is not mandatory, but is highly recommended.

Vendors can obtain the written minutes of the Bidders' Conference from APC.

## **3.0 PROJECT/SERVICES INFORMATION**

*(A sample structure for a project or the required Services is provided below. Depending on the scope of the project or required Services, some of the sections may not be required; other sections may need to be added.)*

### **3.1 Project/Services Overview**

#### **3.1.1 Introduction**

*(Provide a general overview of the project/required Services.)*

#### **3.1.2 Project/Services Objectives**

*(Describe the objectives of the project/required Services. Each objective must be linked to one or more business need and not to specific aspects, attributes or features of an envisioned solution.)*

#### **3.1.3 Background**

*(Describe the current situation.)*

#### **3.1.4 Project/Services Duration**

*(Identify the anticipated project/Services start and completion dates. Any options to:*

- a) extend the Contract and the length of the extension; or*
- b) contract with the successful Vendor for subsequent work or phases of the project,*

*must be identified.)*

### **3.1.5 Project/Services Scope**

*(Describe the scope of the project/required Services. Identify any prior phase documents that form part of the specifications for the project. Identify any contractual arrangements the Department has in place with other vendors that the successful Vendor will be required to work or interface with. Include any information that helps the Vendor to determine as specifically as possible the project size. This may include things like: the business model (including the descriptions of business processes), other finalized business requirements, number of people to be interviewed, organizational units and their structures that will be involved, or any other details that would assist the Vendor in the development of their Proposal.)*

*Identify if the successful Vendor will be precluded from participating in future work related to the project.)*

### **3.1.6 Related Project/Services Documents**

*(Identify any project related documents, if applicable, that will be made available to Vendors during the solicitation process. Indicate from where and from whom they are available, and how they will be made available (e.g. on a sign-out basis, via email). State if Vendors will be required to sign a non-disclosure agreement and, if applicable, include a copy of such agreement.)*

### **3.1.7 Project/Reporting Structure**

*(Identify the individuals (by role), the committees and/or Department management that the Vendor will report to or work with on the project/provision of Services.)*

## **3.2 Project/Services Requirements (Mandatory and Desirable)**

*(Mandatory project/Service requirements should be based on, and support, the objectives of the project. The objectives of the project/Services are developed with the Evaluation Plan and are linked to a business need as opposed to specific aspects or features of envisioned solution or required Services. A process referred to as 'questioning to the void' [described under "List Objectives" in the document entitled, "Request for*

*Proposals (RFP) Response Evaluation Process” available at <https://www.myagent.gov.ab.ca> should be used to refine the list of objectives.])*

### **3.2.1 Project/Services Phases and Deliverables**

Appendix C describes the phases of the project/required Services and/or the deliverables that must be provided by the Vendor.

*(Describe the requirements for the project/Services. It is important that the description of the required deliverables be as detailed as possible to assist Vendors in developing their Proposal.)*

### **3.2.2 Project/Services Status Reporting**

*(Describe the frequency of written project/Services status reports and the required content of these reports, for example:*

*Weekly written status reports shall be submitted to the Department Project Manager. These status reports should outline:*

- *overall summarization of the project/Services progress;*
- *deliverables achieved;*
- *deliverables remaining, progress, and expected delivery on each; and*
- *issues and concerns affecting specific deliverables and the project schedule or any other aspect of the project/Services.)*

### **3.2.3 Department Supplied Resources**

*(Indicate if any office space, equipment, software licenses, secretarial support, or Department human resources will be available to the Vendor during the project.)*

### **3.2.4 Security**

*(Specify the security standard/policies the Vendor must comply with.)*

### **3.2.5 Transition (optional)**

*(Identify any transition requirements.)*

### **3.2.6 Acceptance**

*(The acceptance process that will be used for the project/provision of the required Services must be described.)*

### **3.2.7 Documentation**

*(Describe any documentation requirements to be delivered by the Vendor, for example: manuals.)*

### **3.2.8 Training (optional)**

*(Describe any training to be provided by the Vendor:*

- *Identify who and how many resources require training.*
- *Identify the timing of the training.*
- *Indicate if training is to be provided at the Department's site or off site.*
- *If on-site training is required, indicate if the Vendor will be required to deliver training at multiple locations or at one central location.*
- *Identify location of training facilities.*
- *Describe the equipment and software to be provided at the training facility.*
- *Identify any required content for training materials to be provided to trainees.*
- *Identify any experience/skill requirements for the individual(s) delivering the training.)*

### **3.2.9 FOIP**

*(The requirements of the FOIP Act and Records Management Regulation should be considered during the development of the RFP and Contract.*

*In determining whether access to information, protection of privacy and records management requirements need to be addressed further in the RFP and Contract, Departments should review the documents entitled:*

- *“Freedom of Information and Protection of Privacy – Managing Contracts under the FOIP Act: A Guide for Government of Alberta Contract Managers and FOIP Coordinators” available for review from the following website:  
<http://foip.alberta.ca/resources/publications/pdf/contractmanager.pdf>;*
- *Policy for Protection of Personal Information in Information Technology Outsource Contracts,  
<http://www.sharp.gov.ab.ca/showobject.cfm?docnumber=3293>*

*Procurement Services and Legal Services, Alberta Justice should be consulted prior to any Contract changes being made.*

*The RFP must specify the procedures to be followed by the Vendor upon Contract completion or termination, for disposal of the Department's Confidential Information contained in electronic format in computer hardware of the Vendor or that of its employees, subcontractors, or agents.)*

### **3.2.10 Subsequent Work or Project Phases**

*(If the Department requires an option to contract with the successful Vendor to provide subsequent work or phases of the project, this section should address:*

- *the option to contract with the Vendor for such services;*
- *The period of time the Department reserves the option to contract with the Vendor for such services;*
- *How such services will be provided (i.e. on a time and materials or Fixed Price basis); and*
- *the scope of such services to be provided by the Vendor.)*

### **3.3 Vendor Requirements**

*(Identify any mandatory and/or desirable Vendor experience requirements.)*

#### **3.3.1 Mandatory**

#### **3.3.2 Desirable**

### **3.4 Human Resource Requirements (optional)**

#### **3.4.1 Project/Services Resource Requirements (optional)**

*(Identify the mandatory and/or desirable requirements for the Project/Services Resource(s).)*

##### **3.4.1.1 Mandatory**

- a.
- b.
- c.

##### **3.4.1.2 Desirable**

- a.
- b.
- c.

*(Identify if additional points will be awarded for levels of experience that exceed the minimum levels stated for the mandatory and desirable skill requirements.)*

#### **3.4.2 Project/Services Team Requirements (optional)**

*If resource skills/experience are required in addition to the Project Team requirements, identify the appropriate resource types/categories and the mandatory and/or desirable requirements for each role.*

## **4.0 EVALUATION CRITERIA**

The RFP evaluation criteria will be distributed within the following rating categories.

*(The table should be modified as appropriate to reflect the approach for the project/Services.)*

<b>Evaluation Categories</b>	<b>Evaluation Category Weighting (1 – 10)</b>
• People	
• Processes	
• Tools	
• Products & Deliverables	
• Service Delivery	
• Financial / Pricing	
• Measurement & Continuous Improvement	
• Leadership	
• Experience	
• Value Add	
• Relationship	
• Transition	

Each evaluation category referenced above has been given a weight of between 1 and 10 to reflect its relative importance in the evaluation. For example, the category(ies) that are most important in the evaluation are given a 10. The category(ies) that are least important in the evaluation are given a 1. The remaining evaluation categories are assigned a weighting with those of the same importance being given the same weight. Those that are twice as important as others are assigned twice the weighting, e.g. categories assigned a weighting of 6 are twice as important as those assigned a weighting of 3. Note that the total value of the assigned weights is unlikely to be 100 so scores are not addressed in terms of percentage or “out of 100”.

The following RFP requirements will also be evaluated, but not scored:

*(expand this list to reflect the applicable criteria)*

- acceptance of RFP Administration Terms and Conditions;
- acceptance of Contract terms and conditions including any Schedules (Appendix A)

Proposals will be evaluated and scored based on quality of response to the requirements of this RFP. Selection of the preferred Vendor will be based on the highest score.

*(optional)*

Proposals must achieve a minimum of \_\_\_% of the total points for each evaluation category and a minimum overall rating of \_\_\_% of the total points for all rating categories.

*(50% for each rating category and 65% for an overall rating are examples of reasonable scoring thresholds)*

The evaluation framework in Appendix G of this RFP maps the RFP evaluation criteria to each evaluation category identified above.

## **5.0 PROPOSAL CONTENT GUIDELINES**

### **5.1 Proposal Format**

To facilitate ease of evaluation by the Evaluation Team, and to ensure each Proposal receives full consideration, Proposals should be organized in the following format using the section titles and sequence listed below:

- a. Proposal Submission Letter
- b. Table of Contents
- c. Vendor Profile
- d. RFP Requirements
- e. RFP Administration Terms and Conditions
- f. Contract Provisions
- g. Appendices

### **5.2 Proposal Content**

The requirements described with a “must” in this section are required to be provided in the Proposal. It is highly desirable that Proposals also respond to “should” requirements in this section. The Proposal response to all mandatory and desirable requirements in this section will be utilized in evaluating each Proposal.

Vendors proposing an alternative to any RFP requirement must clearly substantiate the merit of the alternative. Proposed alternatives must meet the fundamental intent of the requirement. The acceptability of the alternative will be determined by the Evaluation Team.

#### **5.2.1 Proposal Submission Letter**

The Proposal Submission Letter in Appendix D of this RFP, or a similar representation of the same information, must be completed, signed by an authorized representative of the Vendor, and included in the Proposal.

#### **5.2.2 Vendor Profile**

**5.2.2.1** The Proposal must include:

- a. a brief introduction of the Vendor, identifying the members of the Consortium (if applicable) and the Prime Vendor who will be the Consortium’s contact with the Department;

- b. the full legal name of the Vendor. In the case of Consortium Proposals, the full legal name of the Prime Vendor and each Consortium member must be provided;
- c. the location of the Vendor's head office and service centres. For Consortium Proposals, head office and service centre locations must be provided for each Consortium member; and
- d. details of any and all subcontracting arrangements proposed by the Vendor.

The Proposal should include:

- e. a Vendor contact for all questions and clarifications arising from the Proposal. The contact information should include the person's title, address including email, telephone and facsimile number;
- f. a Vendor contact authorized to participate in Contract finalization. The contact information should include the person's title, address including email, telephone and facsimile number; and
- g. Corporate references for at least \_\_ projects undertaken by the Vendor that are similar in scope and complexity to the project described in this RFP. References should include the name of the client organization, official contact person for the client organization including street address, email address and telephone number. If the Proposal does not include these references the Vendor must provide them within 2 Business Days of a request by Procurement Services. Her Majesty may contact these or other references without prior notice to the Vendor. Vendors who, in the opinion of Her Majesty, receive unsatisfactory references may have their Proposal rejected.

**5.2.2.2** In the case of Consortium Proposals, the Proposal must also:

- a. describe the role of the Prime Vendor and each Consortium member;
- b. identify management, ownership, financial and legal relationships between Consortium members;
- c. demonstrate a Consortium management approach that will ensure, for the duration of the Contract, clear lines of communication and delivery of Services; and
- d. demonstrate that Consortium members are qualified to perform the tasks they have been proposed to perform.

### **5.2.3 RFP Requirements**

*(Requirements to be addressed in the Proposal should be inserted under the appropriate category heading below. In determining the requirements, the Department should consider the needs of the project/attributes of the required Services and what the Vendor should provide and/or demonstrate in its Proposal. Refer to Appendix F of this template and Appendix H of the "Request for*

*Proposals (RFP) Response Evaluation Process” document for sample requirements/questions.)*

**5.2.3.1 People**

**a. Requirements**

1. The Proposal should:
  - a.
  - b.
  - c.

**5.2.3.2 Processes**

**a. Requirements**

1. The Proposal should:
  - a.
  - b.
  - c.

**5.2.3.3 Tools**

**a. Requirements**

1. The Proposal should:
  - a.
  - b.
  - c.

**5.2.3.4 Products & Deliverables**

**a. Requirements**

1. The Proposal should:
  - a.
  - b.
  - c.

**5.2.3.5 Service Delivery**

**a. Requirements**

1. The Proposal should:
  - a.
  - b.
  - c.

### **5.2.3.6 Financial/Pricing**

#### **a. Requirements**

##### **1. The Proposal should:**

- a.
- b.
- c.

##### **2. Mandatory:**

- a. Vendors must use the Pricing Form in Appendix B, or a similar representation of the same information to submit their pricing for the Services and Materials described in this RFP.

### **5.2.3.7 Measurement & Continuous Improvement**

#### **a. Requirements**

##### **1. The Proposal should:**

- a.
- b.
- c.

### **5.2.3.8 Leadership**

#### **a. Requirements**

##### **1. The Proposal should:**

- a.
- b.
- c.

### **5.2.3.9 Experience**

#### **a. Requirements**

##### **1. The Proposal should:**

- a.
- b.
- c.

### **5.2.3.10 Value Add**

**a. Requirements**

**1. The Proposal should:**

- a.
- b.
- c.

**5.2.3.11 Relationship**

**a. Requirements**

**1. The Proposal should:**

- a. include the Vendor's business code of ethics or similar corporate policy, information or statements that the Vendor and its employees, subcontractors, agents, and, if applicable, Consortium members must adhere to with respect to ethical conduct requirements.
- b.
- c.

**5.2.3.12 Transition**

**a. Requirements**

**1. The Proposal should:**

- a.
- b.
- c.

**5.2.4 RFP Administration Terms and Conditions**

Vendors by submitting a Proposal are deemed to have accepted the RFP Administration Terms and Conditions.

In accordance with Clause 2.4.1 (c) of the RFP Administration Terms and Conditions, the Vendor, if it considers portions of its Proposal to be confidential, shall identify those parts of its Proposal to Her Majesty considered to be confidential and what harm could reasonably be expected from disclosure. Her Majesty does not warrant that this identification will preclude disclosure under FOIP.

**5.2.5 Contract Provisions**

Unless the Proposal contains an express provision to the contrary, Vendors by submitting a Proposal are deemed to have accepted each of the provisions of the Contract exactly as drafted (including any Schedules) attached as Appendix A. If the Vendor does not accept a Contract provision exactly as drafted, the Vendor must expressly indicate in its Proposal that it does not accept the Contract provision and provide the Vendor's final position on the provision i.e. the wording that the Vendor requires for the Vendor to enter into a contract. Her Majesty will deem any alternative wording, including suggested, recommended, or proposed wording, as reflecting the Vendor's final position on the provision. Alternative wording should be considered carefully since alternative wording not meeting the fundamental intent of the provision will result in rejection of the Proposal. Her Majesty will determine whether the alternative wording meets the fundamental intent of the provision.

#### **5.2.6 Appendices**

If the Vendor wishes to include any other material not specifically requested by this RFP, it may do so by including additional appendices in the Proposal.

**APPENDIX A  
CONTRACT**

## APPENDIX B PRICING FORM

Vendors must use this Pricing Form, or a similar representation of the same information, to submit their pricing for the Services and Materials described in this RFP.

*(Department to customize this Appendix as appropriate for the project/Services)*

### 1) PROJECT/SERVICES PRICING

<b>Requirement</b>		
a) Fixed Price to deliver the Services and Materials described in this RFP.		Fixed Price
		\$
The price for each of the following which is included within the Total Fixed Price:		
	<b>Fixed Price for Phase/Deliverable/Service</b>	
<ul style="list-style-type: none"> <li>• Identify Phase/Deliverable/Service</li> <li>• Identify Phase/Deliverable/Service</li> <li>• Identify Phase/Deliverable/Service</li> <li>• Identify Phase/Deliverable/Service</li> </ul>	\$	
	\$	
	\$	
	\$	

### 2) SUBSEQUENT WORK OR PROJECT PHASES PRICING (Optional)

<b>Requirement</b>		
		<b>Unit Price (per hour/day)</b>
	<ul style="list-style-type: none"> <li>• Resource Type</li> <li>• Resource Type</li> <li>• Resource Type</li> <li>• Resource Type</li> </ul>	\$ \$ \$ \$

**APPENDIX C**  
**PROJECT/SERVICES PHASES AND DELIVERABLES**

**APPENDIX D  
PROPOSAL SUBMISSION LETTER**

(Vendor Letterhead)

(Date       , 200x)

(name)  
Project Contracting Manager  
Contracted Services Section  
Service Alberta  
Capital Health Centre, South Tower  
9th Floor, 10030-107 Street  
Edmonton, Alberta  
T5J 3E4

RE: Request for Proposals (RFP) Number XXXXX-XX

Enclosed is our Proposal submitted in response to this RFP.

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
(Print Name)

\_\_\_\_\_  
(Title)

\_\_\_\_\_  
(Vendor Address)

\_\_\_\_\_  
(Telephone)

\_\_\_\_\_  
(Facsimile)

## APPENDIX E EVALUATION FRAMEWORK

*(This appendix will assist Vendors in understanding what RFP requirements/questions will be evaluated in each of the Evaluation Categories. Some evaluation criteria may be evaluated in more than one category and therefore the applicable evaluation criteria must be identified each time under such evaluation categories.)*

Evaluation Category	RFP Evaluation Criteria	
	RFP Section	RFP Requirements
People		
Processes		
Tools		
Products & Deliverables		
Service Delivery		
Financial/Pricing	5.2.3.6	a.2.a
Measurement & Continuous Improvement		
Leadership		
Experience		
Value Add		
Relationship	5.2.3.11	a.1.a
Transition		

## APPENDIX F

### SAMPLE RFP REQUIREMENTS/QUESTIONS

*(Sample RFP requirements/questions for the development of section 5.2.3 of the RFP are provided below. Additional sample RFP requirements/questions are included in the document entitled, “Request for Proposal (RFP) Response Evaluation Process” found at the following website: <https://www.myagent.gov.ab.ca>)*

<b>People</b>
<i>(Requirements/questions in this category allow the Evaluation Team to evaluate the quality of the Vendor’s personnel in terms of availability, capability, skills, and knowledge).</i>
<ul style="list-style-type: none"> <li>• Describe how you propose to deal with vacation, illness, resignations, training and other absences of proposed resources.</li> </ul>
<ul style="list-style-type: none"> <li>• Demonstrate that the proposed resources satisfy the requirements described in this RFP.</li> </ul>
<ul style="list-style-type: none"> <li>• In response to section 3.4.1 Resource Requirements of this RFP, provide a completed Resource Experience Summary Form. A blank Resource Experience Summary Form is included in Appendix __ of this RFP.</li> </ul>
<ul style="list-style-type: none"> <li>• Provide a detailed resume for each team resource identified in the Proposal: Resumes should:               <ul style="list-style-type: none"> <li>• clearly indicate the working experience and training the person possesses in any relevant area of expertise;</li> <li>• show the commencement and completion dates of work assignments and projects carried out by this person in support of the amount of experience claimed in the Resource Summary Form <i>(and Resource Experience Summary Sheet Sheet, if applicable)</i>.</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• In response to section 3.4.2 Project/Services Team Requirements of this RFP, provide a completed Project/Services Team Experience Summary Form for each proposed team member identified in the Proposal. A blank Resource Summary Sheet for each category of resource is included in Appendix __ of this RFP.</li> </ul>
<ul style="list-style-type: none"> <li>• Include at least three references from previous clients for whom the person has provided a similar service. If the Proposal does not include these references the Vendor must provide them within 2 Business Days of a request by Procurement Services. Her Majesty may contact these or other references without prior notice to the Vendor. The Proposal may be rejected should any proposed individual receive, in the opinion of Her Majesty, unsatisfactory references.</li> </ul>
<b>Processes</b>
<i>(Requirements/questions in this category allow the Evaluation Team to evaluate the Vendor’s tried and proven approach to managing product and/or delivery of the Services.)</i>
<ul style="list-style-type: none"> <li>• Describe the procedures to be used to identify, report, recover and take remedial steps from slippage in project timelines and deliverables.</li> </ul>
<ul style="list-style-type: none"> <li>• Include a response to section 3.2.6 Acceptance of this RFP.</li> </ul>
<ul style="list-style-type: none"> <li>• Include a response to section 3.2.9 FOIP of this RFP.</li> </ul>
<b>Tools</b>
<i>(Requirements/questions in this category allow the Evaluation Team to evaluate the Vendor’s investment in, and effective implementation/use of tools to manage the processes and the</i>

<i>people.)</i>
<ul style="list-style-type: none"> <li>Describe the change control techniques and tools that would be used by the Vendor, including project management software tools.</li> </ul>
<b>Products &amp; Deliverables</b>
<i>(Requirements/questions in this category allow the Evaluation Team to evaluate the products and deliverables that the Vendor will deliver to the client on a regular basis in terms of quality, viability, etc.)</i>
<ul style="list-style-type: none"> <li>Demonstrate the Vendor's understanding of the project requirements and deliverables, which highlights, or emphasizes any aspects which the Vendor considers unique to this particular project/provision of the required Services.</li> </ul>
<ul style="list-style-type: none"> <li>Include a detailed workplan for the completion of the project. The plan should identify: <ul style="list-style-type: none"> <li>all tasks, phases, and stages to be completed;</li> <li>what deliverable or result is produced by each task;</li> <li>which personnel are allocated to each task;</li> <li>estimated number of person days (based on a 7.25 hour day) for each task and for the whole project;</li> <li>start and end dates and an elapsed time estimate for each task, and the whole project;</li> <li>a Gantt chart with the complete project schedule of tasks, or an equivalent clear representation of the same information.</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>Include a response to section 3.2.1 Project/Services Phases and Deliverables of this RFP.</li> </ul>
<ul style="list-style-type: none"> <li>Include a response to section 3.2.4 Security of this RFP.</li> </ul>
<ul style="list-style-type: none"> <li>Include a response to section 3.2.7 Documentation of this RFP.</li> </ul>
<ul style="list-style-type: none"> <li>Include a response to section 3.2.8 Training of this RFP.</li> </ul>
<b>Service Delivery</b>
<i>(Requirements/questions in this category allow the Evaluation Team to evaluate the Vendor's ability to deliver the Services described in the RFP.)</i>
<ul style="list-style-type: none"> <li>Describe the team organization and management strategy that would be used to implement the proposed approach, including the reporting relationships required.</li> </ul>
<ul style="list-style-type: none"> <li>Describe the proposed technical approach to the project.</li> </ul>
<ul style="list-style-type: none"> <li>Demonstrate the Vendor's commitment to delivery and schedule.</li> </ul>
<ul style="list-style-type: none"> <li>Include a response to section 3.2.10 Subsequent Work or Project Phases.</li> </ul>
<b>Financial / Pricing</b>
<i>(Requirements/questions in this category allow the Evaluation Team to evaluate the Vendor's financial proposal.)</i>
<ul style="list-style-type: none"> <li>Vendors must use the Pricing Form in Appendix B to submit their pricing for the Services and Materials described in this RFP.</li> </ul>
<b>Measurement &amp; Continuous Improvement</b>
<i>(Requirements/questions in this category allow the Evaluation Team to evaluate the Vendor's approach to service measurement and plans for continuous improvement.)</i>

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<b>Leadership</b>
<i>(Requirements/questions in this category allow the Evaluation Team to evaluate the Vendor's ability to provide thought leadership in the provision of the Services (anticipate, shape, assess and apply innovation.)</i>
<b>Experience</b>
<i>(Requirements/questions in this category allow the Evaluation Team to evaluate the Vendor's experience in terms of capability, depth, breadth, ability to respond quickly, and creative relationships.)</i>
<ul style="list-style-type: none"> <li>• Provide a response to section 3.3 Vendor Requirements of this RFP.</li> </ul>
<b>Value Add</b>
<i>(Requirements/questions in this category allow the Evaluation Team to evaluate the value-add that the Vendor proposes. Value add means services of value to the Department over and above the required Services specified in the RFP and included in the proposed pricing.)</i>
<ul style="list-style-type: none"> <li>• Describe "Value Add" component of your Proposal, i.e., deliverables/services of value to the Department over and above the required deliverables/Services specified in this RFP and included in the proposed pricing.</li> </ul>
<b>Relationship</b>
<i>(Requirements/questions in this category allow the Evaluation Team to evaluate the Vendor's ability to establish and maintain an effective relationship at all levels.</i>
<ul style="list-style-type: none"> <li>• Include a response to section 3.2.2 Project/Services Status Reporting.</li> </ul>
<b>Transition</b>
<i>(Requirements/questions in this category allow the Evaluation Team to evaluate the Vendor's ability and plans to transition the Department to the Vendor's proposed Services and/or new Vendor.)</i>
<ul style="list-style-type: none"> <li>• Describe the proposed strategies to ensure a seamless transition from the current environment into the new Services and/or Vendor.</li> <li>• Include a response to section 3.2.5 Transition of this RFP.</li> </ul>

**APPENDIX \_**  
**RESOURCE EXPERIENCE SUMMARY FORM**

<b>RFP Reference No.</b>	<b>Description of RFP Requirement</b>	<b>Experience Claimed</b>	<b>Name of Client Organization &amp; any pertinent details to further support experience claim</b>	<b>Project Start and End dates</b>	<b>Resume Cross Reference</b>
	<b>Mandatories</b>				
3.4.1.1 a.	<i>(insert requirement as stated in the RFP)</i>				
3.4.1.1 b.	<i>(insert requirement as stated in the RFP)</i>				
3.4.1.1 c.	<i>(insert requirement as stated in the RFP)</i>				
	<b>Desirables</b>				
3.4.1.2 a.	<i>(insert requirement as stated in the RFP)</i>				
3.4.1.2 b.	<i>(insert requirement as stated in the RFP)</i>				
3.4.1.2 c.	<i>(insert requirement as stated in the RFP)</i>				

**APPENDIX \_**  
**PROJECT/SERVICES TEAM EXPERIENCE SUMMARY FORM**

Name of Individual: \_\_\_\_\_

<b>RFP Reference No.</b>	<b>Description of RFP Requirement</b>	<b>Experience Claimed</b>	<b>Name of Client Organization &amp; any pertinent details to further support experience claim</b>	<b>Project Start and End dates</b>	<b>Resume Cross Reference</b>
3.4.2					
	<b>Mandatories</b>				
	<i>(insert requirement as stated in the RFP)</i>				
	<i>(insert requirement as stated in the RFP)</i>				
	<i>(insert requirement as stated in the RFP)</i>				
	<b>Desirables</b>				
	<i>(insert requirement as stated in the RFP)</i>				
	<i>(insert requirement as stated in the RFP)</i>				
	<i>(insert requirement as stated in the RFP)</i>				