# REQUEST FOR PROPOSALS FOR

**RFP NUMBER**

**RFP 20xx- Dept\_00#**

**DATE OF ISSUANCE**

**Jan 31, 20xx**

**REQUEST FOR PROPOSALS FOR**

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**PART I**

**GENERAL INFORMATION FOR VENDORS**

**I-1. Purpose.** This Request for Proposals (RFP) relates to planned requirements of The Michener Institute for Applied Health Sciences (hereby referred to as “Michener”) with respect to assessment of existing Michener space utilization and future functional planning options.

**I-2. Scope.** This RFP presents instructions governing the proposals to be submitted and the material to be included therein; a description of the service to be provided; requirements which must be met to be eligible for consideration; evaluation criteria; deliverables; and other requirements. All RFP’s must be delivered and/or emailed to the Bid Administrator:

Contact Name

The Michener Institute, 222 St. Patrick Street

Toronto, Ontario M5T 1V4

Floor

@michener.ca

# I-3. Problem Statement.

Provide a paragraph spelling out what we are trying to do.

**I-4. Type of Contract.** Michener makes no promise that one or more contracts will be entered into as a result of this RFP. In the event that a contract or contracts are awarded as a result of this RFP, they will be for the exclusive supply of all or specifically identified separate elements of this RFP. Michener expects to develop significant insights into approach and methodologies through the RFP process. Therefore, Michener specifically reserves the right to negotiate the agreement, methodology and pricing with the Preferred Vendor as part of the contracting process.

**I-5. Rejection of Proposals.** Michener reserves the right to reject any and all proposals received as a result of this request. Where this procurement does not result in contracts for the supply of all elements of this procurement, a separate a subsequent procurement will be implemented.

**I-6. Incurring Costs.** Michener is not liable for any costs incurred by Vendors prior to issuance of a contract.

**I-7. Calendar of Events.** Michener will make every effort to adhere to the following schedule but dates may be adjusted at Michener’s sole discretion:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Activity** | **Responsibility** |  | **Date** |  |
| Issue RFP on MERX | Michener |  | Date issued |  |
| Manaatory Site Visit (Information Session) | Proponent |  | Date + # calendar days |  |
|  |  |  |  |  |
|  |  |  |  |  |
| Deadline to submit questions for clarification via email to  [”procurement@michener.ca”](mailto:procurement@michener.ca) | Proponent |  | Date + # calendar days | |
| Answers to Proponent questions for clarification | Michener |  | Date + # calendar days |  |
|  |  |  |  |  |
| Deadline to submit RFP to the Michener at the address stated in Section I-2. | Proponents |  | Date + minimum 25  calendar days |  |
|  |  |  |  |  |
| Second Stage of RFP: Selected Vendor Presentations (If Required by The Michener Institute) | Proponents |  | TBD |  |
| Selection Process – Preferred Proponent Notified | Michener |  | TBD |  |
| Contract Exectuion | Michener |  | TBD |  |

**I-8. Questions & Answers.** Proponents shall address any question for clarification regarding this RFP by submitting a question in writing (via email – entitle subject line “RFP 20xx- Dept\_00# Question”) to the Bid Administrator. Questions must be submitted via email and must be received NO LATER THAN the date indicated on the Calendar of Events (Section I-7).All questions and written answers will be issued as an addendum to and become part of this RFP and will be posted for access by other Proponents. Michener will not provide any verbal information or by any written information respecting this procurement that is not either contained within the solicitation documents or in its responses to questions for clarification.

**I-9. Response Date.** To be considered, completed proposals must arrive at the Issuing Office on or before the time and date specified in the Calendar of Events (Section I-7). Vendors who mail or otherwise deliver proposals should allow sufficient delivery time to ensure timely receipt of their proposals. If, due to inclement weather, natural disaster, or any other cause, Michener office (location) to which proposals are to be returned is closed on the proposal response date, the deadline for submission shall be automatically extended until the next Michener business day on which the office is open, unless the Vendors are otherwise notified by Michener. The time for submission of proposals shall remain the same. Late proposals will not be considered.

**I-10. Proposals.** To be considered, Proponents must submit a complete response to the mandatory requirements of this RFP, using the format provided in PART II, with respect to the elements of this procurement which they propose to fulfill. Preference will be given to Proponents who propose to fulfill all elements of this procurement. However, if there is no

satisfactory proposal covering all RFP elements, consideration will be given to proposals that address portions of this procurement. Proponents are cautioned against providing information respecting this procurement or their proposals to Michener, its Directors, management and employees by any other means. Each proposal page should be numbered for ease of reference. Proposals must be signed by an official authorized to bind the Vendor to its provisions. A Proponent’s proposal must remain valid and binding for at least **120** days or until any dispute arising from this procurement has been fully resolved, whichever comes later. Proponents are reminded that contents of the successful proposal(s) will become contractual obligations.

In submitting a proposal Proponents are deemed to waive any right to withdraw or modify it, except as hereinafter provided. Proposals may be withdrawn by written notice received at the Issuing Office’s address for proposal delivery prior to the exact hour and date specified as the deadline for receipt of proposals. A proposal may also be withdrawn in person by a Proponent or its authorized representative provided that a receipt for the proposal is provided by the Proponent or its representative. A proposal may only be modified by the submission of a new sealed proposal or submission of a sealed modification which complies with the requirements of this RFP following withdrawal of the previous proposal.

**I-11. Economy of Preparation.** Michener encourages proposals to be prepared simply and economically, providing a straightforward, concise description of the Proponent’s ability to meet the requirements of the RFP**.**

**I-12. Discussions for Clarification.** Proponents may be invited after the deadline for proposals to provide oral or written clarification of their proposals. The Bid Administrator will initiate requests for clarification.

**I-13. RFP Contents.** Proposals will be treated as confidential. Proponents should note that disclosure of the contents of a proposal may nevertheless be required to be made (i) under the provisions of any Canadian law, statute or regulation; or (ii) by rule or order of any court of competent jurisdiction. If a contract is executed based on a proposal under this RFP, however, the proposal submitted in response to this RFP shall form part of the contract with Michener and will be subject to disclosure. All material submitted with a proposal becomes the property of Michener and may be returned only at the Michener’s option. Proposals submitted to Michener may be reviewed and evaluated in confidence by its staff, internal and external advisors as well as those of partner organizations at the discretion of Michener.

**I-14. Restriction of Contact.** From the issue date of this RFP until a final determination is made regarding the selection of a Vendor’s proposal, any contacts with the Michener personnel concerning this RFP, proposals and the evaluation process must be approved in advance in writing through the Bid Administrator. Any violation of this requirement will disqualify the Proponent’s proposal. If it is discovered that any such violations have occurred on the part of a Selected Vendor, Michener may rescind that contract at no cost or penalty to Michener. Selected Vendors are required to agree to make no other distribution, assignment, or subcontracting of any part of their contract beyond that identified in their proposal without

the prior written consent of Michener. A Proponent who shares information contained in its proposal with other Michener personnel and/or any competing Vendor will be disqualified.

**I-15. Michener Participation.** Unless specifically noted in this RFP, the Selected Vendor(s) will provide all services to complete the identified work.

**I-16. Vendor’s Representations and Authorizations.** Each Proponent by responding to this RFP understands, represents, and acknowledges that:

1. All information provided by, and representations made by, the Proponent in the proposal are material and will be relied upon by the Issuing Committee in assessing the proposal and in awarding the contract(s). Any misrepresentation will result in disqualification.
2. The price(s) and product or service descriptions of presented in its proposal have been arrived at independently and without consultation, communication or agreement with any other Vendor or potential Vendor.
3. The prices, fees or charges or related estimates presented in its proposal, have not been disclosed to or discussed with any other firm or person who is or may be a Proponent Vendor or potential Vendor.
4. No attempt has been made or will be made to induce any firm or person to refrain from submitting a proposal under this RFP, or to submit a proposal higher than its proposal, to submit any intentionally high or noncompetitive proposal, or to submit any other form of complementary proposal.
5. The proposal is made in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary or other noncompetitive proposal.
6. Until the Selected Vendor receives a fully executed and approved written contract from the Issuing Office there is no legal and valid contract with Michener, in law or in equity, and the Vendor may not begin to perform work.

**I-17. Notification of Selection.** The Proponent, whose proposal is determined to be the most advantageous to Michener, as determined by the Evaluation Committee, will be notified in writing of its selection as the Preferred Vendor. No Preferred Vendor shall be considered to be a Selected Vendor until a contract has been awarded.

**I-18. Proponent Debriefing.** Unsuccessful Proponents may request a debriefing. Such requests should be made as soon as possible, but no later 60 days after, the awarding of contract(s) pursuant to this RFP.

**I-19. Bid Protest.** In the event that an unsuccessful Proponent elects to protest the implementation of this procurement or a contract award made under this RFP, a written

submission presenting the grounds for such protest must be received by Michener within 10 working days from which the basis of the Bid Protest was known, or should reasonably have been known, to the Proponent. If a Bid Protest is received, Michener will establish an ethical, fair, reasonable and timely Bid Protest Review procedure consistent with the principles of the Broader Public Service Procurement Directive and its Implementation Guidebook, taking into account the nature of the specific Bid Protest, with preference being given to an informal negotiated resolution.

# PART II

**INFORMATION REQUIRED FROM VENDORS**

Proponent proposals are to be submitted in the format, including heading descriptions, outlined below. To be considered, the proposal must respond to all mandatory requirements and to those rated elements of the RFP upon which the Proponent has elected to make a specific proposal. Any other information thought to be relevant, but not applicable to the RFP elements that are being bid on, should be provided as an appendix to the RFP. **Proponents are encouraged to keep their proposals to 20 pages, excluding appendices.**

Michener reserves the right to request additional information which, in the Michener’s opinion, is necessary to assure that the Proponent’s competence, number of qualified employees, business organization, and financial resources are adequate to perform according to the contract.

Michener may make such investigations as deemed necessary to determine the ability of the Proponent to successfully perform the work, and the Proponent shall furnish Michener all such information. The Michener reserves the right to reject any proposal if the evidence submitted by, or investigation of, such Proponent does not satisfy the Michener that such Vendor is properly qualified to carry out the obligations of the agreement and to complete the work specified.

**II-1. Statement of the Problem.** State in succinct terms your understanding of the best way to supply the products and services identified as Requirements by this RFP upon which you are bidding, and describe and demonstrate your ability to comply with the requirements and scenarios outlined within Part IV.

**II-2. Management Summary.** Include a narrative description of the proposed effort and a list of the items to be delivered or services to be provided.

**II-3. Approach and Plan.** Describe in narrative form your plan for accomplishing the work identifying related rationale and benefits. Specifically identify any methodologies to be used during the project including identifying related activities or phases. Ensure to identify challenges or dependencies for completing work and deliverables for the various activities or phases. Identify any requirements of Michener staff and leadership that you will feel will be important to successful and effective project execution.

Use the phase descriptions and related activities in Part IV of this RFP as your reference point. Indicate the number of person hours allocated to each activity stream. Include a Gantt chart, or similar type display, related effort, and showing each event and major outcome.

**II-4. Prior Experience.** Present experience in functional planning, architecture and other relevant fields should be identified and substantiated. Experience shown should involve work to be done by individuals who will be assigned to this project as well as that of your firm. Studies or projects referred to should be identified and the name of the customer shown,

including the name, address, and telephone number of the responsible official of the customer, company, or agency who may be contacted.

**II-5. Proposal Submission.** The Proposal Submission shall indicate the Proponent’s ability to satisfy project and other requirements indicated in Part IV. Close consideration should be given to the information and other requirements outlined in this Part II as well as the criteria outlined in Part III.

**II-6. Pricing Submission.** Include a budget itemizing costs for resources by day(s), tasks, and deliverables as well as any foreseen travel and other related costs for Phase I. Rates for individual resources in relation to effort specified in the Vendor proposal as well as for any subsequent or related work that may be negotiated (as part of Phase I or subsequent phase) between Michener and the Selected Vendor should be identified.

# PART III CRITERIA FOR SELECTION

**III-1. Selection Methodology**

Step 1 will consist of an evaluation of Mandatory requirements. Only those proposals that meet the Mandatory requirements will be evaluated for Rated Requirements.

Step 2 will consist of an evaluation of Rated Requirements with points allocated as per Table 1 below.

Step 3 will consist of a presentation phase at the discretion of Michener. The presentation is to confirm the information provided in the Vendor’s Proposal Submission. Michener reserves the right to adjust the rated scores based on the presentation.

Step 4 will consist of an evaluation of Pricing Submission. Upon completion of Step 3, the pricing provided by each proponent will then be opened and Step 4 will consist of a scoring of the pricing submitted. The evaluation of price/cost shall be undertaken after the evaluation of mandatory requirements and rated requirements has been completed.

**III-2. General Requirements.** To be eligible for selection, the RFP must be (a) timely received from a Vendor and (b) properly signed and authorized by the Vendor. In addition, Vendors should ensure that their submission is formatted such that all cost data is kept separate from and not included in the Proposal Submission. Vendors should also ensure they provide the information specified in Part II of this RFP.

**III-3. Evaluation Committee.** Proposals will be reviewed and evaluated by a committee of qualified personnel selected by Michener. This Evaluation Committee will recommend for selection the proposal or proposals which it determines will be the most advantageous to Michener after applying the Evaluation Criteria below.

**III-4. Rated Requirements.** The following criteria will be used by the evaluation committee in assessing all aspects of a proposal where the Proponent has met all Requirements.

* **Understanding of Michener requirements:** Proposals will be evaluated based on the strength of understanding of Michener requirements as demonstrated in the Project Approach, Plan and other aspects of the submission.
* **Project Approach and Plan**: Submitted project approach descriptions and project plans will be evaluated for clarity, alignment with stated project objectives, and internal consistency with other aspects of the Vendor proposal including cost submissions.
* **Connection to Strategy:** Proposals will be evaluated based on the strength of evidence that the Vendor understands the connection between organizational strategy and facility utilization.
* **Experience with Similar Projects:** Proposals should demonstrate experience in developing programmatic facilities based on business strategy, growth planning and improved space and facility utilization.
* **Pragmatic and Practical:** Proposals should demonstrate a practical understanding of implementation and changes in physical settings of institutions including but not limited to phasing, impact on building infrastructure, cost implications, general timeframes and delivering best long-term value to the Michener Institute.
* **Experience with Similar Institutions:** Vendors proposing resources with demonstrable experience working with and/or within similar academic and educational organizations will be given preference.
* **Financial Impact and Cash Flow Forecast**: Proponents will be evaluated on the overall cost of the bid, and the available financing options (e.g. cash flow total cost over a period of time).

Proponents may be requested to provide presentation illustrating the ability of their products and services to meet the RFP Requirements to which their proposal relates. Vendors will be contacted by the Bid Administrator regarding the logistics and content of such presentation.

**III-5**. **Scoring and Weighting.** The Evaluation Committee will score Proposal and Pricing Submissions based on the following evaluation framework and scoring:

# Table 1: Evaluation Framework

|  |  |  |  |
| --- | --- | --- | --- |
| **NO.** | **PROPOSAL COMPONENTS** |  | **POINT ALLOCATION** |
| 1 | **Implementation Plan and Approach**   * Understanding of Michener Requirements (10 points) * Project Approach and Plan (30 points) * Pragmatic and Practical Approach (5 points) * Connection to Strategy (5 points) |  | **50 points** |
|  |  |  |  |
| 2 | **Qualifications and Experience**   * Experience with Similar Projects (10 points) * Experience with Similar Institutions (10 points) |  | **20 points** |
|  |  |  |  |
| 3 | **Presentation**   * Format to be provided in advance   Presentations will be used to validate and enhance |  | **Not scored** |

|  |  |  |
| --- | --- | --- |
|  | understanding of Proposal Submission and may result in re-scoring (up/down) of previous components. |  |
| 4 | **Price**   * Phase I (25 points) * Phase II (5 points)   Pricing will be evaluated separately from Parts 1 – 3 above. | **30 points** |
|  | **Total Available Points** | **100 points** |

**III-6. Price Evaluation.** Pricing will be scored as follows:

* Pricing will be scored based on a relative pricing formula for Phase I and Phase II as separate evaluations.
* Each proponent will receive a percentage of the total possible points allocated to price for the particular Phase it has bid on by dividing that proponent’s price into the lowest bid price. For example, if the lowest bid price for a particular category is $120.00, that proponent receives 100% of the possible points for that category (120/120 = 30 points), a proponent who bids $150.00 receives 80% of the possible points for that category (120/150 = 24 points) and a proponent who bids $240.00 receives 50% of the possible points for that category (120/240 = 15 points).

Lowest rate

------------------- x Total available points = Score for proposal with 2nd lowest price

2nd lowest rates

Lowest rate

------------------- x Total available points = Score for proposal with 3rd lowest price

3rd lowest rates

And so forth for each proposal.

# Cumulative Score

At the conclusion of Step 4, all scores from Steps 1 to 4 will be added and, subject to satisfactory reference checks and the express and implied rights of Michener, the highest scoring proponent will be selected to enter into an Agreement with Michener.

In the event of a tie, then the Vendor with highest score on *Implementation Plan and Approach*

will be selected to move forward to Agreement negotiation.

**PART IV WORK STATEMENT**

***Problem Statement.*** Provide a paragraph spelling out what we are trying to do.

***Requirements.*** Spell out exactly what we are looking for.

**PART V FORM OF OFFER**

# Proponent Information

(Completed by Proponent)

* 1. Proponents Full Legal Name
  2. Any other relevant name under which the Proponent carries on business:

1. Jurisdiction under which the Proponent is governed:
2. The name, address, telephone, facsimile number and e-mail address of the contact person for the Proponent is:
3. Whether the Proponent is an individual, a sole proprietorship, a corporation, a partnership, a joint venture, an incorporated consortium or a consortium that is a partnership or other legally recognized entity:

# Mandatory Forms

Proposals which do not comply with all of the mandatory requirements, subject to the express and implied rights of Michener, will be disqualified and not evaluated further.

Other than inserting the information requested on the mandatory submission forms set out in this RFP, a proponent may not make any changes to any of the forms. Any proposal containing any such changes, whether on the face of the form or elsewhere in its proposal, may be disqualified.

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# Addenda

The Proponent is deemed to have read and accepted all addenda issued by Michener prior to the Deadline for Issuing Addenda. The onus remains on Proponents to make any necessary amendments to their Proposal based on the addenda. The Proponent is requested to confirm that it has received all addenda by listing the addenda numbers or,

if no addenda were issued, “None”: .

# Conflict of Interest

If the box below is left blank, the Proponent will be deemed to declare that: (1) there was no Conflict of Interest in preparing its Proposal; and (2) there is no foreseeable Conflict of Interest in performing the contractual obligations contemplated in the RFP.

Otherwise, if the statement below applies, check the box.

* The Proponent declares that there is an actual or potential Conflict of Interest relating to the preparation of its Proposal, and/or the Proponent foresees an actual or potential Conflict of Interest in performing the contractual obligations contemplated in the RFP.

If the Proponent declares an actual or potential Conflict of Interest by marking the box above, the Proponent must set out below details of the actual or potential Conflict of Interest:

# Offer

The Proponent has carefully examined the RFP documents and has a clear and comprehensive knowledge of the Deliverables required under the RFP. By submitting the Proposal, the Proponent agrees and consents to the terms, conditions and provisions of the RFP and offers to provide the Deliverables in accordance therewith at the Rates set out in the Rate Bid Form.

|  |  |
| --- | --- |
| Signature of Witness | Signature of Proponent representative |
| Name of Witness | Name and Title |
| Date: | |
| I have authority to bind the Proponent | |

# PART VI RATE BID FORM

All Proponents must complete the following Bid Rate Form and return by the Proposal Submission Deadline to be considered. The prices bid by Proponents shall represent the full amount chargeable for the provision of the work in Canadian funds.

As per Section 4.6 Consultants and Other Contractors of the Broader Public Sector Expense Directive, fees for hospitality, incidental (parking) or food expenses are not considered allowable expenses for disbursements. Proponents will indicate on their fee proposal the lump sum not to exceed cost for disbursements and the actual distance and cost per kilometer. Any claims against the disbursement line item must be clearly documented and supported with receipts.

# NAME OF PRIME CONSULTANT/PROPONENT LEAD MEMBER:

**Sub-consultants:**

|  |  |
| --- | --- |
| **SCOPE OF WORK** | **LUMP SUM FEE** |
| 1 | **$** |
| 2 | **$** |
| 3 | **$** |
| 4 | **$** |
| **GRAND TOTAL** | **$** |
| **TAXES (HST)** | **$** |
| **GRAND TOTAL INCLUSIVE OF TAX** | **$** |

**RATE BID FORM (cont’d)**

1. Hourly Rates for Additional Services if Required

Please use the following table to indicate hourly rates for all key staff proposed.

|  |  |  |  |
| --- | --- | --- | --- |
| **FIRM** | **POSITION** | **NAME** | **HOURLY RATE $** |
|  |  |  |  |
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# PART VII REFERENCE FORM

Each Proponent is requested to provide references from clients who have obtained similar services from the Proponent in the last five (5) years as those requested in this RFP. Three

(3) references are required for the Prime Consultant and two (2) references for each of the Mechanical and Electrical Engineering Sub-Consultants.

Reference #1

|  |  |
| --- | --- |
| Company Name: |  |
| Company Address: |  |
| Contact Name and Title: |  |
| Contact Telephone Number: |  |
| Date Work Undertaken: |  |
| Nature of Project:  Value of Project: |  |

Reference #2

|  |  |
| --- | --- |
| Company Name: |  |
| Company Address: |  |
| Contact Name and Title: |  |
| Contact Telephone Number: |  |
| Date Work Undertaken: |  |
| Nature of Project:  Value of Project: |  |

Reference #3

|  |  |
| --- | --- |
| Company Name: |  |
| Company Address: |  |
| Contact Name and Title: |  |
| Contact Telephone Number: |  |
| Date Work Undertaken: |  |
| Nature of Project:  Value of Project: |  |

# PART VIII

**PROPOSAL RETURN LABEL**

**AFFIX THIS LABEL TO YOUR SUBMISSION PACKAGE ENVELOPE**

Proponent to complete the following:

**(Full Legal Name and Address)**

NAME: **RFP 20xx–Dept\_00#**

ADDRESS:

**RFP Title: \_\_\_**

**PROPOSAL SUBMISSION**

**DEADLINE: TBD**

CONTACT:

PHONE:

**TO: The Michener Institute of Education at UHN C/O Procurement department/ Name 222 St. Patrick Street,**

**6th Floor, Room 644 Toronto, ON M5T 1V4**

**The Postal Code is to aid in identifying the building only. The onus remains solely with Proponents to instruct courier/ delivery personnel to deliver Proposals to the exact location specified above by the Proposal Submission Deadline. Proponents assume sole responsibility for late deliveries if these instructions are not strictly adhered to.**

**IMPORTANT INSTRUCTIONS**

**Proposals must be submitted in a sealed package(s) to the address indicated on the Proposal Return Label between the hours of 9:00am and 5:00pm ( EST), Monday through Friday (excluding Statutory Holidays), AND NO LATER THAN THE PROPOSAL SUBMISSION DEADLINE NOTED ABOVE.**

The Michener Institute of Education at UHN does not accept responsibility for Proposals directed to any location other than the address indicated on the label above. The Postal Code is to aid in identifying the building only. **The onus remains solely with Proponents to instruct courier/ delivery personnel to deliver Proposals to the location specified above. Proposals that are delivered to another address before the deadline but arrives at the address specified after the deadline will be disqualified.**

**Proponents assume sole responsibility for late deliveries if these instructions are not strictly adhered to.**

Failure to affix this Label to your submission envelope/ package may also result in submissions not being recognized as Proposals. This could result in your Proposal arriving late at The Michener Institute of Education at UHN and will be deemed late, disqualified and returned to the Proponent.

**Proposals received by Fax or any other kind of electronic transmission will be rejected.**