



Student Transportation Services: RFS Procurement Guide

This is a procurement guide for stage two of a Two-Stage procurement process for Student Transportation Services.

This document supplements the *RFS Template*.

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SECTION 1: INTRODUCTION

The Purpose of the Procurement Guide

This Procurement Guide provides guidance to the Consortia in preparing for and undertaking stage two of a two-stage procurement process. This guide supplements the *RFS Template and the RFS Submission Template*.

The information in this guide is presented as a series of questions and answers grouped by the key activities undertaken during the procurement process.

Guidance for stage one is provided in a separate document titled *RFSQ Procurement Guide*.

The Purpose of the Request for Services (RFS)

The RFS is the stage two procurement document that will be sent to Qualified Suppliers on the Qualified Suppliers List, inviting them to submit a proposal for the delivery of student transportation services.

The RFS details the specific requirements for student transportation and sets out the process by which Qualified Suppliers will be evaluated and selected for contract award.

The Intended Audience

This procurement guide is for use by School Board Officials. However, recognizing that this audience may not be familiar with or experienced in public sector procurement, it may be helpful to contact the applicable school board/Consortium for their advice and support.

Public Sector Procurement Principles

The two-stage procurement process, developed for use by the Consortium, is in compliance with the Broader Public Sector Procurement Directive (Directive) and other applicable acts and regulations including the Agreement on Internal Trade and the Ontario Government procurement directives.

The two-stage process has been designed in a manner that is easy to follow and is intended to provide an alternative procurement approach that school boards and consortia can use in meeting the expectations and requirements to use open, fair, and transparent procurement processes.

A read of the Directive will provide a more complete understanding of procurement within the broader public sector including a discussion of purpose, principles, practices and objectives.

SECTION 2: DEFINITIONS

Terms	Definitions
Addendum or Addenda	A document prepared and issued by the Consortium in advance of the RFS closing date that informs Qualified Suppliers about updates or changes to the RFS or the RFS process. Addenda are made available to Qualified Suppliers using the same methods used to issue the RFS.
Evaluated Requirement	Requirements identified in the Statement of Work that will require Qualified Suppliers to provide a written response as set out in Section 4 of the <i>RFS Template</i> .
Form of Agreement	The terms and conditions of what will become the contract with operators. The Statement of Work and the Pricing Evaluation Form are attached to the Form of Agreement to create the contract.
Pricing Evaluation Form	This is the formal pricing offer from the Qualified Suppliers that will be submitted as part of the Qualified Suppliers' response to the RFS.
Qualified Supplier	Suppliers on the Qualified Suppliers List that qualified through stage one.
Quality Criteria	Step II will consist of evaluating and scoring each compliant Submission on the basis of the responses to the Quality Criteria set out in section 4.2. Step II is weighted at >insert [suggest 75%] of the total points available for the rated criteria.
Response	A written response prepared and submitted by a Qualified Supplier in response to the RFS. Synonymous with the term Submission.
Request for Services (RFS)	A Request for Services is used to invite Qualified Suppliers to supply goods and/or services or construction or to provide alternative options or solutions. It is a process that uses predefined evaluation criteria in which price is not the only factor.
Request for Supplier Qualifications (RFSQ)	A Request for Supplier Qualifications (RFSQ) is used as the first stage of a two-stage procurement process. It is designed to obtain information about the capabilities and qualifications of potential suppliers and used to identify qualified candidates in advance of competitions.
Submission	A written response prepared and submitted by a Qualified Supplier in response to the RFS. Synonymous with the term Response.
Statement of Work (SOW)	A description of the services required by the Consortium. The Statement of Work will be appended to and form part of the agreement between the Qualified Supplier and the Consortium.

SECTION 3: PREPARING THE REQUEST FOR SERVICES (RFS)

An *RFS Template* has been prepared for use by the Consortium when undertaking the RFS procurement process (stage two). It provides the base document which will be modified by the Consortium as appropriate to reflect its requirements.

This RFS is composed of five (5) sections and eight (8) Appendices. These are:

Section 1: Introduction. This section introduces the opportunity, the contracting approach and provides some background information.

Section 2: Statement of Work. This section describes the services that are required by the Consortium. The Statement of Work will be appended to and form part of the agreement between the Qualified Supplier and the Consortium.

Section 3: Submission Evaluation Process. This section explains how Qualified Suppliers will be evaluated.

Section 4: Submission Requirements. This section details the information that must be provided by the Qualified Suppliers in responding to the RFS. This information will be evaluated as per the process described in Section 3 of the *RFS Template*.

Section 5: Terms and Conditions of the RFS Process. This section details important information about the process such as dates and times, contact information, and rights of the Consortium and Qualified Supplier.

Appendix A: Form of Agreement. These are the terms and conditions of what will become the contract with operators. The Statement of Work and the Pricing Evaluation Form are attached to the Form of Agreement to create the contract.

Appendix B: Form of Offer. Qualified Suppliers must sign this form to accept the terms and conditions of the process and to formalize their financial offer.

Appendix C: Route Information. This identifies the areas for which the Consortium requires student transportation.

Appendix D: Pricing Evaluation Form. This is the formal pricing offer from the Qualified Supplier.

Appendix E: Submission Labels. Qualified Operators will be responding to this RFS in two envelopes. The first envelope will contain the written response to Section 4, Submission Requirements. The second envelope will contain the response to Appendix D, Pricing Evaluation Form. A submission label is provided for each envelope.

Appendix F: Submission Checklist. This checklist is to assist Qualified Suppliers with ensuring that all materials are contained in their Submission.

Appendix G: Reference Form. Qualified Suppliers must provide at least one reference.

Appendix H: Bundle Preference. Qualified Suppliers are to rank the bundles in order of preference in the event a Qualified Supplier exceeds the Consortium's competition threshold.

The *RFS Template* is annotated to identify where the Consortium will amend the document for its particular procurement. Items highlighted in yellow are optional content and items in red in the *RFS Template* identify the minimum set of modifications that will be made by the Consortium before the RFS is finalized and issued.

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Question	Answer
General Questions:	
How does the Consortium modify/prepare the RFS?	<p>Start with the <i>RFS Template</i> as the base document and modify the Sections that are annotated and items that are highlighted in red in the <i>RFS Template</i> as needed to reflect the particulars of the Consortium.</p> <p>Sections to be modified and highlighted items are discussed in this section of this guide.</p>
Questions re: Specific Sections and Sub-sections in the <i>RFS Template</i>:	
Referring to the title page: what are the <i>Issue Date</i> and the <i>Submission Deadline</i> date?	<p>The <i>Issue Date</i> is the date the RFS is sent to Qualified Suppliers.</p> <p>The <i>Submission Deadline</i> specifies the date (referred to as the “Closing Date”) and time (referred to as the “Closing Time”) by which Submissions (i.e. written responses) to the RFS <u>must</u> be received by the Consortium.</p> <p>Determine the Closing Date based on the total number of calendar days you believe Qualified Suppliers may require to prepare and submit a quality Submission e.g. 25 calendar days would be considered reasonable.</p> <p>Determine a Closing Time that will be convenient for the Consortium to receive Submissions.</p>
Referring to Section 1: how do we determine what percentage of routes in a region and/or the whole jurisdiction of the consortium should be limited to a Qualified Supplier?	The Consortium should review its existing and approved student transportation procurement policy. If the Consortium has a route allocation cap provision in its procurement policy it should be included in this section.
Referring to sub-section 1.1: why is the term of the agreement five years with an option to extend for two additional one-year periods?	Consultations with operators suggested that this period would allow Qualified Suppliers to obtain the best financing terms from financial institutions.
What does the Consortium include in sub-sections 1.4 and 1.5 of the <i>RFS Template</i> ?	<p>In sub-section 1.4, the Consortium will provide general background information about the Consortium. The Consortium may use content from the RFSQ.</p> <p>In sub-section 1.5, the Consortium will provide information that establishes a context for the requirement of student transportation services. The Consortium may use content from the RFSQ.</p>
Referring to Section 2: we assume the Consortium modifies the Model Statement of Work as necessary to fit the needs of our local environment?	<p>Yes that is correct. The Consortium will need to review and refine the Model SOW to reflect its own student transportation requirements and fit the needs of their local environment.</p> <p>Items identified as an “Evaluated Requirement” will require Qualified Suppliers to provide a written response to these requirements as set out in Section 4 of the <i>RFS Template</i>. If the Consortium adds, deletes or modifies an Evaluated Requirement, Section 4 of the <i>RFS Template</i> will need to be adjusted accordingly.</p>
Referring to sub-section 2.1.1: we assume the Consortium lists the routes, vehicles, route	<p>Yes this is correct.</p> <p>The Consortium should consider the following information when creating its bundles:</p>

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Question	Answer
<p>distances and bundles to be included in the competition in Appendix C of the <i>RFS Template</i>?</p>	<ul style="list-style-type: none"> • geographic area • number of bundles per area • number of routes per bundle • hard to service routes versus attractive routes • mileage • bus size • local supplier market • route allocation caps • expansion capacity of smaller operators • attractiveness of bundle size to new entrants • pricing strategy
<p>What does the Consortium include in Section 3 of the <i>RFS Template</i>?</p>	<p>The Consortium will provide the information highlighted in red as a minimum.</p> <p>In the first paragraph of sub-section 3.1.2, the Consortium will provide the weighting of the quality criteria out of the total points available for the rated criteria. In the last paragraph of sub-section 3.1.2, the Consortium will include the minimum score threshold that Qualified Suppliers must meet for the quality criteria before moving on to the next Submission evaluation step. Submissions that do not meet the minimum score threshold will be set aside and not evaluated further.</p> <p>In sub-section 3.1.3, the Consortium will provide the weighting of the Pricing Submission Form out of the total points available for the rated criteria.</p>
<p>Referring to sub-section 4.1: we assume the Consortium does not need to make any modifications?</p>	<p>Yes this is correct. However, sub-section 4.1.2 refers to Appendix D the Pricing Evaluation Form which will be completed according the instructions set out in Appendix D of the <i>RFS Template</i>.</p>
<p>What does the Consortium include in sub-section 4.2 of the <i>RFS Template</i>?</p>	<p>The Consortium will provide the information highlighted in red as a minimum.</p> <p>The quality criteria are linked directly to items identified as Evaluated Requirements in the Model SOW. If the Consortium adds, deletes or modifies any of the Evaluated Requirements in the Model SOW, the Consortium needs to adjust sub-section 4.2 to reflect the changes.</p> <p>For sub-sections 4.2.1, 4.2.2, 4.2.3, 4.2.4, 4.2.5 and any additional quality criteria that the Consortium adds, the Consortium must:</p> <ul style="list-style-type: none"> • Decide the relative importance of each quality criteria and assign weightings accordingly. The sum of all the individual quality criteria weightings should equal the total weighting for the quality criteria out of the total points available for the rated criteria as set out in sub-section 3.1.2. • Each quality criteria has three sub-bullets. Decide the relative importance of each sub-bullet and assign weightings accordingly. The three sub-bullets should equal the weighting assigned to that quality criteria.
<p>Referring to sub-section 4.3.4: how does the Consortium decide on the standard kilometres?</p>	<p>Consortia should recall that it is important to be as transparent as possible in terms of how the financial evaluation is conducted. This is why the Pricing Evaluation form discloses the “standard kilometres” that are to be used in calculation of the 5-year Total Cost. In this manner, a Qualified Supplier may calculate their own 5-year Total Cost.</p> <p>Note that the use of standard kilometres is not how the operator will be</p>

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Question	Answer
	<p>compensated. The standard kilometres is used purely for evaluation purposes.</p> <p>The standard kilometres should be used when routes are bundled. When routes are not bundled, the actual distance for the route may be used.</p> <p>The standard kilometres should reflect a value that approximates the average distance within the bundle. Note that the concept of “standard kilometres” was chosen over the calculation of “average kilometres”. This is to keep the RFS simpler. For example, it may be easier to present a “standard kilometres of 115km” in the RFS rather than an “average kilometres of 114.8km”.</p>
<p>Referring to sub-section 5.1.1: how do we determine the dates to be included in the timetable?</p>	<p>The Issuance of the RFS is the date the RFS is issued to Qualified Suppliers. If the Consortium decides to hold an Information Session to help Qualified Suppliers understand the RFS and the RFS process, then the Consortium will enter the date of the Information Session in this space (refer to sub-section 5.1.4 of the <i>RFS Template – Qualified Suppliers’ Optional Information Session</i>). If the Consortium decides not to hold an Information Session, this line must be deleted from the Events Table.</p> <p>If the Consortium decides to hold an Optional Site Visit of representative routes in order to help Qualified Suppliers better understand the service requirements, then the Consortium will enter the date of the Optional Site Visit in this space (refer to sub-section 5.1.5 of the <i>RFS Template – Qualified Suppliers Optional Site Visit</i>). If the Consortium decides not to hold a Site Visit, this line must be deleted from the Events Table.</p> <p>The Date by which Qualified Suppliers must submit Clarification Questions to the Consortium is the date by which Qualified Suppliers should submit any questions or inquiries about the RFS and the RFS process. This date should not be less than 9 business days prior to the Closing Date of the RFS to allow the Consortium sufficient time to prepare and publish any addenda and responses.</p> <p>The date the Consortium intends to issue any Addenda and Responses to Clarification Questions is the date by which the Consortium will issue any Addenda to the RFS as well as any responses to inquiries received from interested Qualified Suppliers. This date should not be fewer than 7 days before the closing date.</p> <p>The Submission Deadline is the Closing Date and Closing Time by which Qualified Suppliers must deliver their Submissions to the location identified in the Submission Label for the complete Submission package in Appendix E of the <i>RFS Template</i>. A Closing Time of 4:00 p.m. local time is common practice, but the Consortium can choose another time of the day. Any Submissions received after the Submission Deadline must not be accepted by the Consortium; they must be returned <i>unopened</i> to the Qualified Supplier.</p> <p>The date the Consortium intends to notify the Qualified Suppliers of the results of the RFS process is the date by which the Consortium anticipates it will have completed the evaluation process and identified the successful Qualified Suppliers.</p> <p>The estimated timeframe that the Consortium intends to verify Submissions as per Section 5.3.9 of the RFS is the estimated time the Consortium will need for Verification of Submissions.</p>

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Question	Answer
Referring to sub-section 5.1.2: who should we name as the Consortium Contact?	<p>The Consortium should name someone who has procurement experience. In addition to the name of the individual, also insert a fax number and an email address for the named individual. Using these two contact methods only will mitigate the potential that Qualified Suppliers will call the contact and attempt to engage the Consortium Contact in a conversation.</p> <p>Qualified Suppliers are informed in the RFS that they can rely only on written communications in the form of addenda and responses to written questions.</p>
Referring to sub-section 5.1.3: can Qualified Suppliers submit clarification questions at any time before the Submission Deadline?	<p>Qualified Suppliers are directed to submit any written clarification questions by the date identified in the Timetable in sub-section 5.1.1 of the <i>RFS Template</i>.</p> <p>If Qualified Suppliers submit written questions after the <i>Date by which Qualified Suppliers must submit clarification questions</i>, the Consortium will determine, in its sole discretion, if it has time to provide a written response to all potential Qualified Suppliers in a reasonable timeframe prior to the Submission Deadline.</p>
Referring to sub-section 3.2: how do we send addenda and responses to the clarification questions?	<p>All addenda and written responses to clarification questions should be sent to Qualified Suppliers using the same method the RFS was sent to Qualified Suppliers, e.g. email.</p> <p>Appendix A of this guide provides a template structure for an addendum.</p>
Referring to sub-section 4.2: why must Qualified Suppliers use the <i>RFS Submission Form</i> ?	<p>The <i>RFS Submission Form</i> is provided for use by the Qualified Suppliers. It is designed to make it efficient for Qualified Suppliers to submit a response to the RFS; reduce the risk that they miss providing a response to a submission requirement; and make it efficient for the Consortium to assess the Submissions for compliance with mandatory requirements and score the quality criteria.</p> <p>Qualified Suppliers will receive a copy of the <i>RFS Submission Form</i> when they receive the RFS.</p>
Referring to sub-section 5.1.4, what information would we offer at the Qualified Suppliers' Information Session?	<p>An information session is conducted very soon after the RFS is issued e.g. within 5 days of the Date of Issuance and is used as an opportunity to inform Qualified Suppliers about the opportunity and how to respond to the RFS. In advance of the Information Session the Consortium will prepare some "speaking notes" which will:</p> <ul style="list-style-type: none"> • Outline the details contained in the RFS; and • Outline how to respond to the RFS e.g. the submission date, time and location (that any Submissions received after the Submission Deadline will be returned to the Qualified Supplier(s) unopened), the number of copies, etc. • A proposed structure / sample agenda for the information session would be to follow the structure of the RFS document: <ul style="list-style-type: none"> ○ General Introduction: Introduce all participants, reminder that all Q&A's will be recorded and sent to all Qualified Suppliers by way of an Addendum, and it is the written responses that is the official response ○ Section 1: Introduction, general introduction of the opportunity, route allocation cap provision if applicable ○ Section 2: Model Statement of Work, student transportation service requirements, highlight the sections that are included in the Quality Criteria that they will be required to provide responses

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Question	Answer
	<p>for</p> <ul style="list-style-type: none"> ○ Section 3: Submission Evaluation Process, three steps to the evaluation process (Mandatory, Quality and Price), minimum Quality Criteria score, weighting between Quality Criteria and pricing ○ Section 4: Submission Requirement, reminder to use the Submission Forms, identifying key aspects of the response requirements such as the importance of responding to the mandatory and emphasizing the potential impacts if the Qualified Supplier does not respond to each of them (i.e. the Submission might be deemed non-compliant and disqualified) ○ Section 5: Terms and Conditions of the RFS Process, review timetable and key dates, submission deadline, contact person ○ Introduce and review the Appendices <p>Adequate time should be given to cover the material. Since it is possible that some Qualified Suppliers are not familiar with public sector procurement processes, extra time may be needed to respond to any questions raised at the session.</p> <p>If Qualified Suppliers raise questions at the session, the Consortium may choose to respond at that time (particularly if it is an easy question e.g. “What is the Submission Deadline?”), or the Consortium may wish to “take the question under advisement” and respond in writing later. Regardless of whether questions are answered at the session, all questions and all responses are to be prepared in writing and made available to all Qualified Suppliers whether they attended the meeting or not. The responses to any questions raised during the session should be sent with the responses to any questions submitted by Qualified Suppliers.</p> <p>Appendix L to this guide provides a Sample Information Session Sign-in Sheet. I</p>
<p>Referring to sub-section 5.1.4, what is the best format for the Qualified Suppliers’ Information Session?</p>	<p>It is strongly recommended the Information Session is conducted in-person. However, given the large geographical area covered by many Consortiums, videoconferencing and teleconference options can be offered to Qualified Suppliers.</p> <p>When offering Qualified Suppliers the option to participate via videoconference for an information session, IT staff should be available on-site to address any potential technical difficulties.</p>
<p>Referring to sub-section 5.3.1: how many copies of the Submission should Qualified Suppliers provide?</p>	<p>Determine the number of copies based on the number of individuals on the submission evaluation team plus an extra copy e.g. if there are 3 members on the team, request 4 copies.</p>
<p>Referring to Appendix E: what address do we insert for delivery of the Submissions?</p>	<p>Insert the physical street address where Submissions are to be delivered. Include all the details needed to ensure the Submissions are delivered to the right place e.g. street address, floor number, suite number. This location must be readily accessible to couriers.</p> <p>The Consortium’s purchasing group likely has a designated receiving location that is set up with date/time stamping capability.</p> <p>All Submissions must be dated and time stamped by the Consortium at the time they are received.</p>

SECTION 4: ISSUING THE RFS

Question	Answer
When do we issue the RFS?	<p>The RFS should be issued to Qualified Suppliers shortly after all Respondents from stage one have been notified of their results of the stage one (RFSQ) process (e.g. one to two weeks after notifications) and preferably after all debriefings.</p> <p>Any subsequent Request for Services should be issued prior to the expiry of the existing Agreement, taking into consideration the time needed for Qualified Suppliers to purchase new buses.</p>
How do we issue the RFS?	<p>The RFS should be sent (e.g. e-mailed) directly to suppliers on the Qualified Suppliers List that was created in stage one.</p>
How long should Qualified Suppliers have to respond to the RFS?	<p>The RFS can remain open for the period of time that the Consortium deems appropriate to ensuring that the Qualified Suppliers will have sufficient time to prepare a quality response e.g. 25 calendar days.</p> <p>If potential Qualified Suppliers feel that this timeframe is not adequate, they may submit a question asking if the period to respond could be extended i.e. revise the Submission Deadline. The Consortium will decide at its sole discretion if an extension is warranted and such extension will apply to all Qualified Suppliers. Qualified Suppliers will be informed of any extension by way of an addendum.</p>
If potential Qualified Suppliers are not familiar with procurement processes, is there a way that we can inform or educate them about the process e.g. do's and don'ts without explicitly telling them how to respond?	<p>Yes the Qualified Suppliers' Optional Information Session referred to in subsection 5.1.4 of the RFS Template is a very effective method of informing individuals and firms about the RFS process.</p> <p>It is recommended that the Consortium hold a Qualified Suppliers' Optional Information Session very soon after the RFS is issued e.g. within 5 days of issuance.</p> <p>Although conducting this session in-person is preferred, it is acceptable for the Consortium to hold the session using a teleconference facility.</p> <p>Refer to Section 3 of this guide for the discussion about submitting inquiries and conducting a Qualified Suppliers' <i>Optional Information Session</i>.</p>

SECTION 5: ACTIVITIES DURING THE RESPONSE PREPARATION PERIOD

This Section identifies the events that may occur during the period of time that Qualified Suppliers are preparing their Submissions i.e. the period between the issuance of the RFS and the Submission Deadline.

Question	Answer
<p>What are we doing during the time that Qualified Suppliers are preparing their Submissions?</p>	<p>If required, preparing addenda to make changes to the RFS or the RFS process. Any addenda must be available to all potential Qualified Suppliers to ensure that each of them has access to the same information by issuing addenda using the same method(s) used to issue the RFS.</p>
	<p>If required, preparing written responses to clarification questions submitted by Qualified Suppliers. Any questions as well as the responses must be available to all Qualified Suppliers to ensure that each of them has access to the same information. The questions together with the responses are made available using the same method(s) used to issue the RFS.</p>
	<p>Getting ready for the Submission review process:</p> <ul style="list-style-type: none"> • Selecting the evaluation team members • Briefing the evaluation team members • Training the evaluation team members • Having them review and sign a Code of Conduct form • Preparing the Evaluation Matrix
	<p>The Consortium should monitor and keep track of the process to ensure that all future communication (e.g. addenda, questions and answers, clarifications, etc.) have been issued to all Qualified Suppliers. Appendix B to this guide is a sample control document that the Consortium can modify for its own process.</p>
<p>When do we brief the evaluation team?</p>	<p>The best time to brief the evaluators on their role and the Submission review process is immediately following the Submission Deadline. Refer to Section 7 of this guide for a discussion on the Submission review process.</p>

SECTION 6: RECEIVING THE SUBMISSIONS

This Section identifies the activities associated with receiving the Submissions.

To be considered, a Submission must be received by the Consortium no later than the Closing Date and Time, collectively referred to as the Submission Deadline. If a Submission is received after the Submission Deadline it must be returned to the Qualified Suppliers unopened, i.e. it cannot be opened and reviewed.

Question	Answer
<p>When the Submissions are received, what do we do?</p>	<p>The receiving process must be established and communicated within the Consortium prior to the Submission Deadline specified in sub-section 5.1.1 of the <i>RFS Template</i>. Appendix E the Submission Label of the <i>RFS Template</i> specifies the address location where Submissions must be delivered e.g. street address, floor number, suite number, as applicable.</p> <p>Each Submission will be date and time stamped <i>immediately</i> upon receipt using the tender clock at the location. This is essential to provide indisputable evidence that a Submission was (or was not) received before the Submission Deadline.</p> <p>Instructions will be established within the Consortium specifying what to do with Submissions upon receipt. Typically, Submissions will be conveyed to a secure room.</p> <p>Any Submissions received after the Submission Deadline - even by seconds - must be returned unopened to the Qualified Supplier.</p>

SECTION 7: THE SUBMISSION EVALUATION PROCESS

The Submission evaluation process is followed to determine which Qualified Suppliers will be selected to enter into the Form of Agreement.

All Submissions received by the Submission Deadline will be evaluated in accordance with the process set out in the *RFS Template*, in Section 3: Submission Evaluation Process.

Question	Answer
<p>Who evaluates the Submissions?</p>	<p>The Consortium will establish a team to evaluate the Submissions. The team members should have:</p> <ul style="list-style-type: none"> • an understanding of the Consortium’s requirements for student transportation services, and • read the RFS document that was issued. <p>One of the team members should be assigned the role of team lead. This individual will be the “go-to” person to support the team and provide direction to them during the evaluation process. For example, if it is necessary to seek clarification about any of the Qualified Suppliers’ Submissions during the evaluation, the team lead will coordinate this activity with the Consortium’s Purchasing representative.</p> <p>To prepare for their role, the team lead should read each Submission to be familiar with the content.</p> <p>It is helpful to have a representative from the Purchasing Department available to support the Submission review process in case there are any questions about process, need for clarification.</p> <p>Guidance for the Submission evaluation process is provided for in a separate document titled <i>RFS Evaluation Training Guide</i>. The Consortium and all members of the evaluation team should review the <i>RFS Evaluation Training Guide</i> before starting the Submission evaluation process.</p> <p>It is important to ensure that none of the evaluators are in an actual conflict of interest. The Code of Conduct is the form that facilitates the declaration of a conflict of interest. If any member of the evaluation team is in a conflict of interest (potential or actual), they may be asked to step down and not participate in the evaluation.</p>
<p>What materials will the Submission evaluation team have to support the review process?</p>	<p>An Evaluator Training Session should be undertaken in advance of the review process to provide consistent direction to the team. Please refer to the RFS Evaluator Training Guide as part of the Two-Stage resource package for guidance on material to be covered during the RFS Evaluator Training Session.</p> <p>The team will use an Evaluation Matrix to record the results of their review process. Appendix C to this guide is a template Individual Evaluation Matrix that the Consortium can modify for its process.</p> <p>A <i>Code of Conduct</i> will be provided to each evaluator before they receive the Submissions. The Code of Conduct sets out the evaluation rules including the need for confidentiality and security of the Submission documents. The Code of Conduct includes a Conflict of Interest Declaration which enables each member of the evaluation team to declare if they have a conflict of interest, real or potential. If any member of the evaluation team is in a conflict of interest, they may be asked to step down and not participate in the evaluation.</p>

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Question	Answer
<p>What does the Evaluation Matrix include?</p>	<p>The Evaluation Matrix includes the Submission Checklist that sets out the quality criteria provided in Section 4 of the RFS. It provides a space for the team member to record a score for each of the quality criteria and a comments column for the team member to record the rationale for the score. Team members must complete the Evaluation Matrix for each Submission.</p>
<p>How do the team members evaluate the Submissions?</p>	<p>The team lead will review the Submissions for compliance with the mandatory requirements described in sub-section 4.1.1 and sub-section 4.1.2 of the <i>RFS Template</i>. Submissions which do not comply with the mandatory requirements will be disqualified and not further evaluated. Only the Submissions deemed to be compliant with the mandatory requirements will be moved to Step II of the evaluation process. Each team member will evaluate only the quality criteria responses that the Qualified Suppliers have provided. Each team member should evaluate the Submissions in a different order, which will be determined by the team lead. Using the scoring scale provided in sub-section 3.1.2 of the <i>RFS Template</i>, each team member will determine the score that best reflects the quality of the response based upon the scoring guidance for that requirement and then record the score in the appropriate space on the Evaluation Matrix. Each team member must also explain their rationale for a score which can be documented in the “Comments” column on the Evaluation Matrix.</p>
<p>What happens when all of the team members have completed their individual evaluations?</p>	<p>The team lead will schedule a consensus session to be attended by all members of the team. The goal of the consensus scoring session is to arrive at a final score for each Submission through a discussion process. The team lead can act as the Chair for the consensus session and facilitate the discussion and help the team arrive at a final consensus score for each quality criteria. The following procedure is typically followed at the session:</p> <ul style="list-style-type: none"> • The team gathers in a room, with their materials – the RFS, the Submissions, and the completed Evaluation Matrix. • For each Submission, the team (in round table format) will state their score for particular quality criteria. • If evaluators have differing scores, a discussion will ensue to resolve the differences with the intent to agree. • The final consensus scores, along with documented comments supporting the results, will be recorded on a Final Evaluation Matrix which becomes the official score. A Final Evaluation Matrix is exactly the same as the form used by each team member but is titled the Final Evaluation Record. Appendix D to this guide is a template Consensus Evaluation Matrix that the Consortium can modify for its process. • All Submissions meeting the minimum threshold will pass through to Step III. Submissions that do not meet the minimum threshold will be set aside and not evaluated further.
<p>What about the pricing evaluation?</p>	<p>The Pricing Evaluation Forms are set aside in a secure location until the completion of the quality criteria evaluation (completion means the final scores are agreed and allocated at the consensus scoring session). Evaluation and scoring of compliant Pricing Evaluation Forms should be in accordance with the process set out in Section 4.4.3 of the RFS. Appendix E to this guide provides a Pricing Evaluation Matrix the Consortium can use.</p>

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Question	Answer
How do we determine the successful Qualified Suppliers?	<p>The successful Qualified Supplier(s) will be determined based upon the process set out in sub-section 3.1.5 of the RFS taking into account the weights to be given to the quality criteria and the Pricing Evaluation Form to determine the overall final total score.</p> <p>The Qualified Suppliers with the highest total score at the end of the evaluation will be identified as the successful Qualified Suppliers. Appendix F to this guide provides an RFS Evaluation Summary sheet that the team lead can use to summarize the evaluation.</p>
What happens once the evaluation process is complete and the final results have been recorded?	<p>The Consortium may decide to verify any statement or claim contained in the Submission and/or verify the Qualified Suppliers' current financial standing to provide assurance that the Qualified Supplier(s) can provide the student transportation services as required by the Consortium over the term of the agreement. The verification process is set out in sub-section 5.3.9 of the <i>RFS Template</i>.</p> <p>Conduct any necessary verification of the successful Qualified Supplier(s) and notify the Qualified Suppliers in writing to confirm if they have been selected to enter into the Form of Agreement. Do not provide any details in respect of their Submission or the results of the evaluation process.</p>

SECTION 8: VERIFICATION

The Consortium may verify any statement or claim contained in the successful Qualified Supplier(s) Submission before entering into the Form of Agreement.

The verification process will be in accordance with sub-section 5.3.9 of the *RFS Template*.

Question	Answer
How should we verify submissions?	<p>The Consortium has the right to verify submissions by interviewing proponents or by seeking substantiating documentation from the Qualified Supplier.</p> <p>It should be noted that questions asked during the interviews or the requests for substantiating information will differ for each Qualified Supplier. This is because the information that must be verified depends on the contents of the Qualified Supplier’s proposal.</p>
When should we verify submissions?	<p>The right to verify (by interview or otherwise) proposals is purposefully designed to occur at the end of the evaluation process. That way, the Consortium is only obligated to review the successful proposals as part of a due diligence process before signing the contract.</p>
Why weren’t interviews included as part of the evaluation process?	<p>If interviews were included as part of the evaluation process, then all Qualified Suppliers would have to be interviewed. This could be a large administrative task for Consortia that have a high number of Qualified Suppliers participating in its process.</p>
What information should we verify?	<p>The Consortium should verify any information that the evaluation team suggests is inaccurate, incomplete or misleading during individual evaluations and at the consensus session. The Consortium should also verify any item that may affect the Qualified Supplier(s) ability to deliver the required student transportation services (i.e. financing for new school buses). Information that the Consortium may verify includes, but is not limited to:</p> <ul style="list-style-type: none"> • safety records; • references; • organization, ownership, authority, existence; • outstanding litigation; • regulatory compliance; • tax compliance; • material contracts, commitments; • financial information; and • any other risks or concerns that the Consortium may have or assurances the Consortium may seek. <p>Appendix G provides a sample Due Diligence and Financial Assurance Request Letter that the Consortium can modify for the information they would like to conduct verification for.</p>
Who should conduct the verification?	<p>The evaluation team lead is responsible for coordinating the verifications and may either conduct the verifications or designate this responsibility to another party involved in the RFS process, such as the Purchasing Department representative.</p> <p>For information that may require expertise related to a certain subject</p>

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Question	Answer
	<p>matter (i.e. financial standing), the Consortium may hire a third party to carry out the verification of a Submission.</p>
<p>How is the verification process conducted?</p>	<p>The Consortium may conduct the verification by e-mail, telephone or by interview.</p> <p>In the event that preferred proponents are new service providers, the Consortium is within its rights to conduct a site visit at the operator’s other location(s) to verify and substantiate the claims in its submission.</p> <p>The evaluation team lead shall maintain a log of all the information for each successful Qualified Supplier that needs to be verified. The person conducting the verification will contact the appropriate persons or entities that will verify the information provided.</p>
<p>When should we conduct reference checks?</p>	<p>Reference checks can be performed as part of the Consortium’s verification process. The following are sample reference check questions that the Consortium can use:</p> <ul style="list-style-type: none"> • What services has the Qualified Supplier provided to you? • How long has the Qualified Supplier provided to you the above service? • Did the Qualified Supplier fulfil the terms of the contract? If not, please explain the deficiencies. • Explain the nature of your experience and working relationship with the Qualified Supplier.
<p>What happens after verification?</p>	<p>In the event that the Consortium receives information at any step of the process which results in earlier information provided by the Qualified Supplier being deemed by the Consortium to be inaccurate, incomplete or misleading, the Consortium reserves the right to revisit the Qualified Supplier’s compliance with the mandatory requirements and/or adjust the scoring of the Quality criteria.</p>

SECTION 9: CONTRACT AWARD

The Qualified Supplier(s) with the highest total score as noted in sub-section 3.1.5 of the *RFS Template* will be informed that they have been successful and are required to enter into the Form of Agreement with the Consortium. Appendix H to this guide provides a Sample Notification Letter to Successful Qualified Suppliers that the Consortium can modify for its process.

The award of a Form of Agreement to the Qualified Supplier should be a matter of taking the Model Form of Agreement provided in Appendix A of the *RFS Template*, amending it to incorporate the particulars of the procurement (e.g. entering the names of the parties, the pertinent dates, etc.), appending the SOW and Pricing Evaluation Form and then executing/signing it.

After the Consortium has received all signed Agreements, the Consortium can notify unsuccessful Qualified Suppliers of the results of the process. Appendix I to this guide provides a Sample Notification Letter to Unsuccessful Qualified Suppliers that the Consortium can modify for its process.

SECTION 10: DEBRIEFING PROCESS

The Notification Letter to successful and unsuccessful Qualified Suppliers remind Qualified Suppliers they have sixty (60) days following the notification letter date to request a debriefing session.

A debriefing provides unsuccessful Qualified Suppliers with an opportunity to understand why they were not selected and learn how they can improve the potential for success in a future procurement.

Question	Answer
Who is entitled to a debriefing?	Any Qualified Supplier that has participated in the RFS process is entitled to a debriefing.
When are debriefings conducted?	Debriefings should be conducted within a reasonable time after the successful Qualified Supplier(s) and the Consortium have entered into the Form of Agreement.
What triggers a debriefing?	<p>Once the notification letters to both successful and unsuccessful Qualified Suppliers have been sent out, Qualified Suppliers have sixty (60) calendar days following the notification letter date to request a debriefing session. Debriefings must be conducted individually for every Qualified Suppliers who responds to the notification letter confirming their interest in a debriefing. Confirmation of the debriefing session should be in writing. The confirmation letter should identify the person conducting the debriefing and provide that person’s contact information. Confirmation letters should be sent by mail, however, a copy of the letter may also be sent by fax or e-mail. Appendix J to this guide is a sample confirmation letter.</p> <p>A debriefing is not a mandatory event. It is held only if requested by the unsuccessful Qualified Supplier.</p> <p>Copies of correspondence must be retained in the procurement file.</p>
Who should be involved in a debriefing?	<p>The evaluation team lead and the Consortium’s Purchasing Department should attend each debriefing.</p> <p>The Purchasing representative should conduct the debriefing.</p> <p>The Fairness Commissioner, if used during the procurement process, oversees the debriefing sessions.</p>
How and where are debriefings held?	<p>Upon confirmation of a Qualified Suppliers’ interest in a debriefing, the evaluation team lead is required to make arrangements for the debriefing meeting. A debriefing is normally held in a face-to-face meeting generally located in the Consortium office. However, it is acceptable to conduct a debriefing via teleconference if this is more convenient to all parties.</p> <p>The evaluation team lead is responsible for providing written confirmation of the debriefing session to all parties. Written notification can be by e-mail, fax, or mail.</p>
How do we prepare for a debriefing?	<p>The Purchasing Department representative and the designated evaluation team member should meet prior to the debriefing session to:</p> <ul style="list-style-type: none"> • Review the Submission, particularly responses to quality criteria; • Review comments noted during evaluation; • Review strengths and weaknesses of the Qualified Suppliers’ Submission; • Discuss and agree on suggestions for improvement to be conveyed to the Qualified Supplier;

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	<ul style="list-style-type: none"> • Discuss potentially contentious issues and determine responses to them; • Ensure roles and responsibilities at the debriefing meeting are understood such as who will present /respond to questions at the debriefing; and • Identify the institution's Freedom of Information and Privacy Office contact information (it may be requested by the Qualified Supplier during debriefing). <p>A debriefing script should be developed in advance for each Qualified Supplier that requested a debriefing session. The individual responsible for delivering the debriefing should follow the debriefing script to ensure all relevant points are addressed. Appendix K to this guide is a sample debriefing template.</p>
<p>What format should the debriefing meeting follow?</p>	<p>The debriefing session should include:</p> <ul style="list-style-type: none"> • Welcome of the Qualified Supplier; • Introduction of all parties in attendance and explaining their role in the procurement; • Stating the purpose of the meeting; • Reviewing the Qualified Supplier's Submission; • Opportunity for questions and answers; and • Formally closing of the debriefing session.
<p>What information do we provide at the debriefing?</p>	<p>The objective of the debriefing is to be informative and helpful to the Qualified Suppliers and to the outcome of the RFS procurement process. The messages conveyed to the unsuccessful Qualified Suppliers are supportive of this objective and may include:</p> <ul style="list-style-type: none"> • General overview of the evaluation process; • Evaluation scores, if more than price is used as evaluation criteria, of the Qualified Supplier's Submission; • Strengths and weaknesses of the Qualified Supplier's Submission in relation to the quality criteria and the Qualified Supplier's evaluated score; • Suggestions on how the Qualified Supplier Submission may be improved in the future; • The Qualified Supplier's evaluation ranking (i.e. 3rd out of 5); • Specific questions and issues raised by the Qualified Supplier; • Feedback from the Qualified Supplier on current procurement processes/practices; and, • Contract Award Notice information that has been shared publicly. <p>No information is to be communicated about any other Qualified Suppliers' Submission and their evaluation results.</p> <p>The Consortium should not provide the unsuccessful Qualified Supplier with any written material.</p>

APPENDIX A: ADDENDUM STRUCTURE

ADDENDUM # > insert number

RFS # >insert number

**Student Transportation Services: Request for Supplier Qualification
> insert Consortium name**

Issue Date: > insert date

Questions and Answers

Q1. > insert question 1

A1. > insert answer to question 1

Q2. > insert question 2

A2. > insert answer to question 2

Q3. > insert question 3

A3. > insert answer to question 3

Q4. >insert question 4

A4. > insert answer to question 4

**ATTACHMENTS TO ADDENDUM # > insert number
> insert attachments**

**AMENDMENTS TO THE RFS
> insert amendments**

END OF ADDENDUM # 1

APPENDIX B: CONTROL DOCUMENT

RFS Control Document

	Representative Name	Representative Contact Details	RFSQ	Information Session	Addenda 1		Addenda 2		Clarification 1		Clarification 2		Comments
			Date Received	In-Person or Video Conference (VC) (Enter names)	Date Sent	Date Received	Date Sent	Date Received	Date Sent	Date Received	Date Sent	Date Received	
Operator 1													
Operator 2													
Operator 3													
Operator 4													
Operator 5													
Operator 6													
Operator 7													
Operator 8													

APPENDIX C: RFS INDIVIDUAL EVALUATION MATRIX

RFS Evaluation Matrix

The evaluation team members will score each quality criteria in the following manner. For simplicity and consistency, quality criteria will be scored (whole numbers only) out of 5 (irrespective of the actual allowable points of the particular requirement). Following the consensus meeting, the scores will be multiplied by the assigned weights to determine the normalized score for each criteria, which are then totalled to determine the final result for each Submission.

<p>Scoring Scale:</p> <p>Superior Response (5): A highly comprehensive, excellent response with demonstrated competency, innovation, and outstanding customer service. In addition, the response may proactively cover areas not originally addressed by the requirement and/or include additional information and recommendations that would prove both valuable and beneficial to the Consortium and stakeholders.</p> <p>Good Response (4): A good response that fully meets the requirement in a clear and comprehensive manner with no deficiencies noted.</p> <p>Satisfactory Response (3): A fair response that meets all or most requirement but lacks clarity or comprehensiveness in some areas.</p> <p>Limited Response (2): A limited response that does not meet most of the requirement due to a lack of clarity and/or comprehensiveness.</p> <p>Inadequate Response (1): An inadequate response containing little detail, structure, clarity or insufficient knowledge of the requirement.</p> <p>Zero Response (0): Information provided does not allow for meaningful evaluation or no information has been provided.</p>
--

Quality Criteria	Weight	Score (0 to 5)	Comments
<p>4.2.1 Vehicle Maintenance</p> <p>Qualified Suppliers are asked to describe what they would do to meet Section [suggest 2.1.4, Vehicle Maintenance] of the Statement of Work. In this manner please:</p> <ul style="list-style-type: none"> Describe how it would be done; Provide an example of having met a similar requirement and the results of providing that service; and Describe the challenges in meeting [suggest 2.1.4, Vehicle Maintenance] of the Statement of Work, and how those challenges will be overcome. 	>insert weight		
<p>4.2.2 Driver Availability</p> <p>Qualified Suppliers are asked to describe what they would do to meet Section [suggest 2.1.18, Driver Availability] of the Statement of Work. In this manner please:</p> <ul style="list-style-type: none"> Describe how it would be done; Provide an example of having met a similar requirement and the results of providing that service; and Describe the challenges in meeting [suggest 2.1.18, Driver Availability] of the Statement of Work, and how those challenges will be overcome. 	>insert weight		
<p>4.2.3 Safety Training</p> <p>Qualified Suppliers are asked to describe what they would do to meet Section [suggest 2.2.1, Safety Training] of the Statement of Work. In this manner please:</p> <ul style="list-style-type: none"> Describe how it would be done; Provide an example of having met a similar requirement and the results of providing that service; and Describe the challenges in meeting [suggest 2.2.1, Safety Training] of the Statement of Work, and how those challenges will be overcome. 	>insert weight		

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Quality Criteria	Weight	Score (0 to 5)	Comments
4.2.4 Compliance with Consortium Policies Qualified Suppliers are asked to describe what they would do to meet Section [suggest 2.2.2, Compliance with Consortium Policies] of the Statement of Work. In this manner please:	>insert weight		
<ul style="list-style-type: none"> • Describe how it would be done; 	>insert weight		
<ul style="list-style-type: none"> • Provide an example of having met a similar requirement and the results of providing that service; and 	>insert weight		
<ul style="list-style-type: none"> • Describe the challenges in meeting [suggest 2.2.2, Compliance with Consortium Policies] of the Statement of Work, and how those challenges will be overcome. 	>insert weight		
4.2.5 Communication with Parents and Consortium Qualified Suppliers are asked to describe what they would do to meet Section [suggest 2.3.1, Communication with Parents and Consortium] of the Statement of Work. In this manner please:	>insert weight		
<ul style="list-style-type: none"> • Describe how it would be done; 	>insert weight		
<ul style="list-style-type: none"> • Provide an example of having met a similar requirement and the results of providing that service; and 	>insert weight		
<ul style="list-style-type: none"> • Describe the challenges in meeting [suggest 2.3.1, Communication with Parents and Consortium] of the Statement of Work, and how those challenges will be overcome. 	>insert weight		

Signature of the Authorized Official

Signature of the Authorized Official

Signature of the Authorized Official

Print Name

Print Name

Print Name

Title

Title

Title

Date

Date

Date

APPENDIX D: RFS CONSENSUS EVALUATION MATRIX

Quality Criteria	Weight	Submission #1					Total Score	Comments
		Evaluator 1 Scores	Evaluator 2 Scores	Evaluator 3 Scores	Consensus Score			
4.2.1 Vehicle Maintenance Qualified Suppliers are asked to describe what they would do to meet Section [suggest 2.1.4, Vehicle Maintenance] of the Statement of Work. In this manner please:	>insert weight							
<ul style="list-style-type: none"> Describe how it would be done; 	>insert weight							
<ul style="list-style-type: none"> Provide an example of having met a similar requirement and the results of providing that service; and 	>insert weight							
<ul style="list-style-type: none"> Describe the challenges in meeting [suggest 2.1.4, Vehicle Maintenance] of the Statement of Work, and how those challenges will be overcome. 	>insert weight							
4.2.2 Driver Availability Qualified Suppliers are asked to describe what they would do to meet Section [suggest 2.1.18, Driver Availability] of the Statement of Work. In this manner please:	>insert weight							
<ul style="list-style-type: none"> Describe how it would be done; 	>insert weight							
<ul style="list-style-type: none"> Provide an example of having met a similar requirement and the results of providing that service; and 	>insert weight							
<ul style="list-style-type: none"> Describe the challenges in meeting [suggest 2.1.18, Driver Availability] of the Statement of Work, and how those challenges will be overcome. 	>insert weight							
4.2.3 Safety Training Qualified Suppliers are asked to describe what they would do to meet Section [suggest 2.2.1, Safety Training] of the Statement of Work. In this manner please:	>insert weight							
<ul style="list-style-type: none"> Describe how it would be done; 	>insert weight							
<ul style="list-style-type: none"> Provide an example of having met a similar requirement and the results of providing that service; and 	>insert weight							
<ul style="list-style-type: none"> Describe the challenges in meeting [suggest 2.2.1, Safety Training] of the Statement of Work, and how those challenges will be overcome. 	>insert weight							
4.2.4 Compliance with Consortium Policies Qualified Suppliers are asked to describe what they would do to meet Section [suggest 2.2.2, Compliance with Consortium Policies] of the Statement of Work. In this manner please:	>insert weight							
<ul style="list-style-type: none"> Describe how it would be done; 	>insert weight							
<ul style="list-style-type: none"> Provide an example of having met a similar requirement and the results of providing that service; and 	>insert weight							
<ul style="list-style-type: none"> Describe the challenges in meeting [suggest 2.2.2, Compliance with Consortium Policies] of the Statement of Work, and how those challenges will be overcome. 	>insert weight							
4.2.5 Communication with Parents and Consortium Qualified Suppliers are asked to describe what they would do to meet Section [suggest 2.4.1, Communication with Parents and Consortium] of the Statement of Work. In this manner please:	>insert weight							
<ul style="list-style-type: none"> Describe how it would be done; 	>insert weight							
<ul style="list-style-type: none"> Provide an example of having met a similar requirement and the results of providing that service; and 	>insert weight							
<ul style="list-style-type: none"> Describe the challenges in meeting [suggest 2.4.1, Communication with Parents and Consortium] of the Statement of Work, and how those challenges will be overcome. 	>insert weight							
Total Score for Quality Criteria								

APPENDIX E: SAMPLE PRICING EVALUATION MATRIX

Submission #1

Bundle A

>insert information for the table from the Pricing Evaluation Form

Standard km for Routes in Bundle	Rate	Year 1	Year 2	Year 3	Year 4	Year 5
	Fixed rate / >insert km					
	Variable rate per km					

Calculate each year's daily rate as set out in the RFS

Example:

Year 1

Fixed rate provided by Qualified Supplier = \$102 / 100 km

Variable rate provided by Qualified Supplier = \$0.90 / km

Standard kilometres for the bundle provided by the Consortium = 115 km

Daily rate = \$102 + (115 km – 100 km) * \$0.90 = \$115.50.

	Year 1	Year 2	Year 3	Year 4	Year 5	Total Daily Rate for 5 years
Daily Rate for Bundle A						

Bundle B

>insert information for the table from the Pricing Evaluation Form

Standard km for Routes in Bundle	Rate	Year 1	Year 2	Year 3	Year 4	Year 5
	Fixed rate / >insert km					
	Variable rate per km					

Calculate each year's daily rate as set out in the RFS

Example:

Year 1

Fixed rate provided by Qualified Supplier = \$102 / 100 km

Variable rate provided by Qualified Supplier = \$0.90 / km

Standard kilometres for the bundle provided by the Consortium = 115 km

Daily rate = \$102 + (115 km – 100 km) * \$0.90 = \$115.50.

	Year 1	Year 2	Year 3	Year 4	Year 5	Total Daily Rate for 5 years
Daily rate for Bundle B						

Submission #2

Bundle A

>insert information for the table from the Pricing Evaluation Form

Standard km for Routes in Bundle	Rate	Year 1	Year 2	Year 3	Year 4	Year 5
	Fixed rate / >insert km					
	Variable rate per km					

Calculate each year's daily rate as set out in the RFS

	Year 1	Year 2	Year 3	Year 4	Year 5	Total Daily Rate for 5 years
Daily Rate for Bundle A						

Bundle B

>insert information for the table from the Pricing Evaluation Form

Standard km for Routes in Bundle	Rate	Year 1	Year 2	Year 3	Year 4	Year 5
	Fixed rate / >insert km					
	Variable rate per km					

Calculate each year's daily rate as set out in the RFS

	Year 1	Year 2	Year 3	Year 4	Year 5	Total Daily Rate for 5 years
Daily rate for Bundle B						

Complete this section as set out in section 4.4.3 Evaluation of Pricing of the RFS

Maximum Number of Points for Pricing

25 >insert

Bundle A

Qualified Supplier	Total Daily Rate for 5 years	Score Calculation	
		Ranking	Score Awarded
Submission #1	\$0.00	Lowest rate	
Submission #2	\$0.00	2nd lowest rate	

Maximum Number of Points for Pricing

25 >insert

Bundle B

Qualified Supplier	Total Daily Rate for 5 years	Score Calculation	
		Ranking	Score Awarded
Submission #1	\$0.00	Lowest rate	
Submission #2	\$0.00	2nd lowest rate	

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APPENDIX F: RFS EVALUATION SUMMARY

Summary of Total Scores				
			Submission #1	Submission #2
Mandatory Requirements	Submitted on Time		Yes or No	Yes or No
	Appendix B	Form of Offer	Yes or No	Yes or No
	Appendix D	Pricing Evaluation Form	Yes or No	Yes or No
	Appendix G	Reference Form	Yes or No	Yes or No
		Move to Stage 2	Yes or No	Yes or No
Rated Requirements	Total Score for Quality Criteria	Points Received out of >insert [suggest 75%]	>insert score from consensus matrix	>insert score from consensus matrix
	Threshold	> insert [suggest 60%]	Yes or No	Yes or No
	Pricing for Bundle A	Points Received	>insert score from pricing evaluation sheet	>insert score from pricing evaluation sheet
	Pricing for Bundle B	Points Received	>insert score from pricing evaluation sheet	>insert score from pricing evaluation sheet
	Pricing for Bundle C	Points Received	>insert score from pricing evaluation sheet	>insert score from pricing evaluation sheet
	Pricing for Bundle D	Points Received	>insert score from pricing evaluation sheet	>insert score from pricing evaluation sheet
		Total Score for Bundle A	Sum of Quality Criteria score and pricing score for bundle A	Sum of Quality Criteria score and pricing score for bundle A
		Total Score for Bundle B	Sum of Quality Criteria score and pricing score for bundle B	Sum of Quality Criteria score and pricing score for bundle B
		Total Score for Bundle C	Sum of Quality Criteria score and pricing score for bundle C	Sum of Quality Criteria score and pricing score for bundle C
		Total Score for Bundle D	Sum of Quality Criteria score and pricing score for bundle D	Sum of Quality Criteria score and pricing score for bundle D

APPENDIX G: DUE DILIGENCE AND FINANCIAL ASSURANCE REQUEST LETTER

Dear **>insert Qualified Supplier's name**

The Consortium, **>insert Consortium's name** has completed the preliminary evaluation results for RFS **>insert RFS #**. This letter is to notify you of the Consortium's intent to move to the next stage of the process. The Consortium would like to remind you that this information is confidential, and that you continue to comply with Section **>insert section from RFS** Confidential Information of Consortium of the RFS **>insert RFS #**.

For this next stage of the evaluation process, the Consortium will be exercising their right to Verify Submissions as per Section **>insert RFS section**. The consortium requests the following information to be submitted by **>insert date and time** by email to **>insert contact email**.

The Consortium would like to know how the Qualified Supplier will fulfill the maintenance and driver requirements described in their submission based on the preliminary results. To reply, please provide the following:

- The intended strategy of the Qualified Supplier to expand their current operation to provide for routes described in the preliminary results, including:
 - o Maintenance facility location(s).
 - o Vehicle acquisition.
 - o Parking provision.
 - o Maintenance facilities.
 - o Spare vehicle placement.
- The intended strategy of the Qualified Supplier to expand their currently described staffing levels to provide drivers for routes described in the preliminary results, including:
 - o Driver recruitment strategy.
 - o New driver training strategy.

Furthermore, the Consortium is also requesting that you provide evidence of current financial standing, as well as assurance on your ability to provide the service over the term of the agreement based on your success in the preliminary results at the rate provided in your Price Submission. It is requested that you provide indication of this evidence through the provision of a reference letter from a Canadian Financial Institution providing banking or credit facilities.

Please see the attachment for a list of bundles (and routes) for which you are at this stage the preferred Qualified Supplier.

If you have any questions, please feel free to contact me.

Regards,

>insert Consortium Contact name and title

APPENDIX H: SAMPLE NOTIFICATION LETTER TO SUCCESSFUL QUALIFIED SUPPLIER

>insert date

>insert successful Qualified Supplier's name

>insert successful Qualified Supplier's address

Solicitation Number: >insert RFSQ number

Issue Date: >insert issue date of RFSQ

Close Date & Time: >insert Submission deadline

Dear >insert name

Thank you for responding to the above referenced procurement opportunity for the provision of student transportation services. This letter is to advise that you have been selected as a Qualified Supplier with whom we would like to undertake a contract for the services set out in the RFS for the following routes >insert routes/bundles.

Each Agreement will be for a term of >insert # of years commencing on or about >insert date and terminating on >insert date. The Consortium may, at its sole discretion, elect to extend the terms of the Agreement for >insert extension options.

Enclosed please find >insert # of copies of the Agreement for your signature. In accordance with Section >insert relevant section from RFS of the RFS, the Agreement must be signed and returned to the Consortium within >insert # of days (as per Section 5.4.1 of the RFS) working days.

In accordance with section >insert relevant section from RFS (5.4.4) of the RFS, within 60 days from the date of this letter you may confirm your interest to participate in a debriefing meeting which will provide you with feedback on your submission. If you have any questions concerning this process or would like to request a debriefing, please contact:

>insert Contact Name

>insert Contact phone number

>insert Contact email address

Thank you for your interest and time in responding to this RFS.

Regards,

>insert Consortium Contact name and title

> insert Consortium Contact phone number

> insert Consortium Contact email address

APPENDIX I: SAMPLE NOTIFICATION LETTER TO UNSUCCESSFUL QUALIFIED SUPPLIER

>insert date

>insert unsuccessful Qualified Suppliers' name

>insert unsuccessful Qualified Supplier's address

Solicitation Number: >insert RFSQ number

Issue Date: >insert issue date of RFSQ

Close Date & Time: >insert Submission deadline

Dear >insert name

I would like to take this opportunity to thank you for responding to the above referenced procurement opportunity for the provision of student transportation services. This letter is to advise that you were not the successful candidate and that the contract has been awarded to >insert name of successful Qualified Supplier(s).

Each Agreement will be for a term of >insert # of years commencing on or about >insert date and terminating on >insert date. The Consortium may, at its sole discretion, elect to extend the terms of the Agreement for >insert extension options.

In accordance with section >insert relevant section from RFS (5.4.4) of the RFS, within 60 days from the date of this letter you may confirm your interest to participate in a debriefing meeting which will provide you with feedback on your submission. If you have any questions concerning this process or would like to request a debriefing, please contact:

>insert Contact Name

>insert Contact phone number

>insert Contact email address

Thank you for your interest and time in responding to this RFS.

Regards,

>insert Consortium Contact name and title

> insert Consortium Contact phone number

> insert Consortium Contact email address

APPENDIX J: SAMPLE DEBRIEFING CONFIRMATION LETTER

>insert date

>insert unsuccessful Qualified Suppliers' name

>insert unsuccessful Qualified Supplier's address

Dear >insert name

Subject: Debriefing Notification regarding >insert RFS number

I am pleased to confirm that your debriefing session has been scheduled as follows:

>Insert Date

>Insert Time

>Insert Location

>Insert Teleconference # (if applicable)

This notification is in response to your request for a debriefing for the above procurement. The purpose of the debriefing is to review the procurement and evaluation process, discuss the strengths and weaknesses of your submission, and receive your feedback on the procurement process.

If you are unable to attend at this time please let me know as soon as possible.

Regards,

>insert Consortium Contact name and title (i.e. evaluation team lead or purchasing department representative)

> insert Consortium Contact phone number

> insert Consortium Contact email address

APPENDIX K: DEBRIEFING TEMPLATE

Organization Name:	>insert
RFS # and Title:	>insert
Proponent Name:	>insert
Debrief Facilitator:	>insert
Proponent Representative Attendees:	>insert
Debriefing Date and Time:	>insert
Debriefing Location:	>insert
Organization Participants:	>insert

INTRODUCTION, PURPOSE AND AGENDA

Hi, >insert name thank you for taking the time to discuss your Submission today. With me in the room / on the call is:

- >insert names of other participants

The purpose of this meeting is to provide a debriefing on your Submission in response to the RFS for student transportation services.

There were >insert # Qualified Suppliers that were evaluated for the technical score requirements, >insert list of other Qualified Suppliers and yourselves.

It is important to note that we can only discuss the evaluation of your Submission and we will only discuss criteria that were contained within the RFS and we will not debate the evaluators’ findings or the results of the process.

We will begin with an explanation of the evaluation process. Then provide high-level comments regarding the evaluation of your Submission against the technical criteria and suggestions on how you may improve future submissions. After that there will be a chance for you to provide feedback on the procurement process and ask questions.

EXPLANATION OF THE EVALUATION PROCESS

- The evaluation process was based on established public procurement best practices
- The evaluation process was applied consistently for all Qualified Suppliers
- >insert name of Fairness Commissioner if applicable, the Fairness Commissioner oversaw the evaluation process and attended the consensus sessions

Mandatory Requirements – Section >insert of the RFS

- This is a process to verify that all the mandatory requirements were satisfied (pass/fail).

- All mandatory requirements were reviewed and all compliant Submissions moved to the evaluation of the Quality Requirements.
- If the Qualified Supplier did not meet the mandatory requirements, the Submission was not evaluated further.

Evaluation of Quality Requirements – Section >insert of the RFS

- This is an evaluation and scoring of the responses to the technical requirements set out in Section >insert of the RFS.
- All Submissions were scored separately, and then consensus scores were reached for each criteria
- The maximum point allocation for the quality requirements was 75 points
- A minimum score of 45 points for was needed in order for a Qualified Supplier to proceed to financial evaluation.

Financial Evaluation – Section >insert of the RFS

- This was an evaluation and scoring of the proposed pricing from each qualified Submission, using a relative formula outlined in Section >insert of the RFS.
- The maximum point allocation for the financial evaluation was 25 points.

Cumulative Score

- The scores from the quality evaluation and financial evaluation were added together to arrive at a total score for each Qualified Supplier for each bundle that was proposed on.

EVALUATION OF QUALIFIED SUPPLIER’S SUBMISSION

Mandatory Requirements

- >insert results

Evaluation of Quality Requirements

- Your Submission scored >insert out of the available 75 points. It was ranked >insert out of >insert Submissions.

Financial Evaluation

- Out of the possible 25 points for each bundle your submission scored the following:

Bundle	Points
>insert	
>insert	
>insert	

Strengths / Areas for Improvement

Vehicle Maintenance

- Scored of **>insert** out of **>insert** points for the description of how it would be done
- Scored of **>insert** out of **>insert** points for providing an example of meeting a similar requirement
- Scored of **>insert** out of **>insert** points for describing the challenges

Strengths:

- **>insert strengths**

Areas for Improvement:

- **>insert areas for improvement**

Driver Availability

- Scored of **>insert** out of **>insert** points for the description of how it would be done
- Scored of **>insert** out of **>insert** points for providing an example of meeting a similar requirement
- Scored of **>insert** out of **>insert** points for describing the challenges

Strengths:

- **>insert strengths**

Areas for Improvement:

- **>insert areas for improvement**

Safety Training

- Scored of **>insert** out of **>insert** points for the description of how it would be done
- Scored of **>insert** out of **>insert** points for providing an example of meeting a similar requirement
- Scored of **>insert** out of **>insert** points for describing the challenges

Strengths:

- **>insert strengths**

Areas for Improvement:

- **>insert areas for improvement**

Compliance with Consortium Policies

- Scored of >insert out of >insert points for the description of how it would be done
- Scored of >insert out of >insert points for providing an example of meeting a similar requirement
- Scored of >insert out of >insert points for describing the challenges

Strengths:

- >insert strengths

Areas for Improvement:

- >insert areas for improvement

Communication with Parents, Boards and Consortium

- Scored of >insert out of >insert points for the description of how it would be done
- Scored of >insert out of >insert points for providing an example of meeting a similar requirement
- Scored of >insert out of >insert points for describing the challenges

Strengths:

- >insert strengths

Areas for Improvement:

- >insert areas for improvement

GENERAL SUGGESTIONS FOR FUTURE SUBMISSIONS

- >insert general comments

ASK FOR FEEDBACK ON THE PROCUREMENT PROCESS AND QUESTIONS

CLOSING REMARKS

The Consortium appreciates the time and effort that you have invested in the Submission. We hope that the feedback we provided you today was helpful and will assist you in your future Submissions and we encourage your participation in future processes.

APPENDIX L: SAMPLE INFORMATION SESSION SIGN-IN SHEET

RFS Information Session for >insert Consortium's name

Date: >insert date

ID	Name	Title	Company
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			