



## **Student Transportation Services: RFSQ Procurement Guide**

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

This document supplements the *RFSQ Template*.

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## PLANNING FOR A COMPETITIVE PROCUREMENT

Consortia must engage in substantial planning to ensure that a competitive procurement process will achieve the desired business objectives.

### **Business Objectives**

Consortia should clearly identify the objectives and priorities of the competitive procurement. The desired business objectives of the Consortia may include:

- Improve quality of service;
- improve pricing;
- provide steady service to rural or hard to service areas;
- increase number of suppliers; and
- achieve value for money.

The Consortia's desired business objectives will influence the strategy of the competitive procurement including: the evaluated quality criteria, the weighting between quality and price and the bundling strategy.

### **Market Analysis**

An analysis of the current operator environment should also be conducted prior to beginning a competitive procurement. This includes:

- assessing the readiness of operators responding to competitive procurement;
- the number of operators and size of operations;
- attractive areas versus hard to service areas;
- areas of service that are superior;
- areas of service that could be improved; and
- the likelihood of attracting newcomers and competition.

The market analysis will also influence the strategy of the competitive procurement including: the pricing and bundling strategy, inclusion of clauses regarding the percentage of routes any one operator can hold, identifying sole-source opportunities and the level of support and training needed for operators.

### **Timeline and Governance**

It is recommended Consortia plan the timing of the competitive procurement process considering the amount of time operators require to make the necessary investments needed in order to operate in an area, including adjustments to fleet vehicles and drivers. In addition,

Consortia should ensure operators have sufficient time to understand the process and procurement documents in order to submit an informed and considered proposal. Timelines should also reflect the Consortia's internal requirements including legal review and approval from the board of directors.

Consortia should plan for the required approvals necessary to award contracts and ensure sufficient time has been allocated for approvals. The Consortium should clarify whether the school boards are required to sign contracts, or if the Consortium has delegated authority to sign contracts on behalf of the school boards.

### **Communication Strategy**

Prior to beginning a competitive procurement process, Consortia should develop a clear communication strategy that addresses all key stakeholders relevant to their local environment and communication protocols for staff. This includes preparing a communication strategy for each stage of a competitive procurement process which includes:

- Pre-process - prior to release of the procurement document;
- In-process – from the release of the procurement document through to debriefing sessions;
- Post-process – after debriefings have been conducted.

The Consortia should be prepared for stakeholder reaction, which includes possible negative responses from unsuccessful operators and associations.

### **Resources**

As part of the planning process, Consortia should confirm they have the resources available for the successful completion of the procurement. Managing a competitive procurement is a time consuming process. Consortia should ensure that the individuals involved in the procurement process can commit to their roles and obligations.

- Project Manager – It is recommended that the Consortia's Transportation Manager, or equivalent, fulfil this role. The Project Manager is responsible for planning and executing the procurement process and is the individual responsible for managing the resulting contracts.
- Purchasing Coordinator - It is highly recommend that an individual from the purchasing department assist with the procurement activities of the process. This includes acting as the contact person for the procurement process. A representative from purchasing will have knowledge of board procurement policies, standard procurement practices and processes, communication protocols, and tools & templates.

- Evaluation Team – The Evaluation Team is responsible for conducting the evaluation of the responses to the Quality Criteria, participate in consensus meetings, and form recommendations for contract award. It is suggested that the Evaluation Team have sufficient representation amongst the Consortium’s participating School Boards to support the outcome of the evaluation process. It is suggested that at least one representative from each School Board is an evaluation team member.
- Procurement Consultants – Procurement consultants assist in managing a competitive procurement process, from document creation, through evaluation, to contract signing. Procurement consultants also are familiar with the relevant rules governing competitive procurement such as the Broader Public Sector Procurement Directive.
- Fairness Advisors / Commissioners – Fairness Advisors oversee the procurement process to ensure the process is conducted in a fair, open and transparent manner and that the conduct of the procurement process is free of favouritism or bias.
- Legal Counsel – It is recommended the Consortia have access to legal counsel with a speciality in procurement to review procurement documents and contracts.

It is recommended that elected officials do not take part in the procurement process to prevent any perceived conflicts of interest. There should be adequate levels of support for all staff involved in the procurement process. Training should be provided to ensure individuals understand the procurement process, communication protocols, and their relevant roles.

## SECTION 1: INTRODUCTION

### **The Purpose of the Procurement Guide**

This Procurement Guide provides guidance to the Consortia in preparing for and undertaking stage one of a two-stage procurement process. This guide supplements the *RFSQ Template and the RFSQ 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 two is provided in a separate document titled *RFS Procurement Guide*.

### **The Purpose of the Request for Supplier Qualifications (RFSQ)**

The RFSQ is the stage one procurement document that invites all Respondents qualified to provide student transportation services, to submit a proposal to be included on the Qualified Suppliers List.

The RFSQ sets out the process by which Respondents will be evaluated and selected to be included on a Qualified Suppliers List.

### **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**

<b>Terms</b>	<b>Definitions</b>
<b>Addendum or Addenda</b>	A document prepared and issued by the Consortium in advance of the RFSQ closing date that informs potential Respondents about updates or changes to the RFSQ or the RFSQ process. Addenda are made available to interested Respondents using the same methods used to issue the RFSQ.
<b>Respondent</b>	An individual or firm that responds to an RFSQ.
<b>Response</b>	A written response prepared and submitted by a Respondent in response to the RFSQ. Synonymous with the term Submission.
<b>Request for Service (RFS)</b>	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.
<b>Request for Supplier Qualifications (RFSQ)</b>	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 used to identify qualified candidates in advance of competitions.
<b>Service Area</b>	A service area means an area that comprises routes and runs.
<b>Submission</b>	A written response prepared and submitted by a Respondent in response to the RFSQ. Synonymous with the term Response.
<b>Supplier</b>	An individual or firm that provides the type of services required.
<b>Two-Stage Procurement/Competitive Process</b>	A procurement process that is comprised of two stages. Stage one typically involves the issuance of an open Request for Supplier Qualifications (RFSQ) to pre-qualify suppliers for a subsequent competitive process and award of contracts in stage two. Stage two is initiated with the issuance of a Request for Service (RFS) and ends with the award of contract to the successful supplier(s).

**SECTION 3: PREPARING THE REQUEST FOR SUPPLIER QUALIFICATIONS (RFSQ)**

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

The *RFSQ Template* identifies, **in red**, the minimum set of modifications that will be made by the Consortium before the RFSQ is finalized and issued.

Question	Answer
<b>General Questions:</b>	
What is an RFSQ?	<p>An RFSQ is a procurement document that enables the Consortium to gather information about supplier capabilities and qualifications. It is used to pre-qualify suppliers for a subsequent competition in stage two of a two-stage procurement process.</p> <p>At the end of stage one, pre-qualified suppliers will be included on a list (“Qualified Suppliers” List). Only suppliers included on this list will be invited to respond to the second stage of the two-stage process.</p>
How does the Consortium modify/prepare the RFSQ?	<p>Start with the <i>RFSQ Template</i> as the base document and modify the items that are <b>highlighted in red</b> in the <i>RFSQ Template</i> as needed to reflect the particulars of the Consortium.</p> <p>Each of the <b>highlighted items</b> is discussed in this section of this guide.</p>
<b>Questions re: Specific Sections and Sub-sections in the <i>RFSQ Template</i>:</b>	
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 RFSQ is issued for access by interested Respondents. The RFSQ will be issued using MERX identified in Section 4 of this guide.</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 RFSQ <u>must</u> be received by the Consortium.</p> <p>Determine the Closing Date based on the total number of calendar days you believe Respondents may require to prepare and submit a quality Submission e.g. 25 calendar days would be considered reasonable.</p> <p>A Closing Time of 4:00 p.m. local time has been provided for the convenience of the Consortium but, this can be changed to a different time at the discretion of the Consortium.</p>
Referring to Section 1: why is the period of the Suppliers’ List four years with an option to extend for two additional one-year periods?	<p>The period is intended to align with the term of the contracts that will be issued during stage two of the procurement process.</p> <p>The term of the Suppliers’ List will enable the Consortium to undertake a new RFSQ process to create a new Suppliers’ List to support future competitive processes i.e. as the contracts expire/terminate.</p>
What does the Consortium include in Section 2 of the <i>RFSQ Template</i> ?	<p>The Consortium will provide the information specified in red as a minimum.</p> <p>In sub-section 2.2.1, the Consortium will provide information that establishes a context for the requirement of student transportation services. Some suggested content is provided in the <i>RFSQ Template</i>.</p> <p>Sub-section 2.2.2 refers to Appendix A which will be completed by the Consortium to identify the areas for which it requires student transportation. Section 2.2.2 of the <i>RFSQ Template</i> explains the purpose of this information.</p>



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Question	Answer
	<p>Sub-sections 2.2.4 provide a description of the driver licensing requirements that must be met by suppliers of student transportation services. The Consortium may amend this information as applicable to ensure that it is accurate and complete before the RFSQ is issued.</p>
<p>Referring to sub-section 3.1: how do we determine the dates to be included in the Events Table?</p>	<p>The <b>Issuance of the RFSQ</b> is the date the RFSQ is issued on MERX and accessible by interested suppliers.</p> <p>If the Consortium decides to hold a Respondent Information Session to help Respondents understand the RFSQ and the RFSQ process, then the Consortium will enter <b>the date of the Information Session</b> in this space (refer to sub-section 3.3 of the <i>RFSQ Template – Respondent Information Session</i>). If the Consortium decides not to hold an information session, this line must be deleted from the Events Table.</p> <p>The <b>Date by which Respondents should submit Inquiries to the Consortium</b> is the date by which Respondents should submit any questions or inquiries about the RFSQ and the RFSQ process. This date should not be less than 9 business days prior to the Closing Date of the RFSQ to allow the Consortium sufficient time to prepare and publish any addenda and responses.</p> <p>The <b>Submission Deadline</b> is the Closing Date and Closing Time by which Respondents must deliver their Submissions to the location identified in sub-section 3.3 of the <i>RFSQ 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 Respondent.</p> <p>The <b>date the Consortium intends to issue any Addenda and Responses to Inquiries</b> is the date by which the Consortium will issue any Addenda to the RFSQ as well as any responses to inquiries received from interested Respondents. This date should not be fewer than 7 days before the closing date.</p> <p>The <b>date the Consortium intends to notify the Respondents of the results of the RFSQ process</b> is the date by which the Consortium anticipates it will have completed the evaluation process and confirmed which Respondents have qualified for inclusion on the List.</p>
<p>Referring to sub-section 3.2: who should we name as the Consortium Representative?</p>	<p>The Consortium should name someone who has procurement experience.</p> <p>In addition to the name of the individual, also insert a fax number and an email address for the named individual. Using these 2 contact methods only will mitigate the potential that Respondents will call the contact and attempt to engage the Consortium Representative in a conversation.</p> <p>Respondents are informed in the RFSQ that they can rely only on written communications in the form of addenda and responses to written questions.</p>
<p>Referring to sub-section 3.2: can Respondents submit clarification questions at any time before the Submission Deadline?</p>	<p>Respondents are directed to submit any written clarification questions by the date identified in the Events Table in sub-section 3.1 of the <i>RFSQ Template</i>.</p> <p>If Respondents submit written questions after the <b>Date by which Respondents must submit clarification questions</b>, the Consortium will determine, in its sole discretion, if it has time to provide a written response to all potential Respondents in a reasonable timeframe prior to the Submission Deadline.</p>

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Question	Answer
<p>Referring to sub-section 3.2: where do we post addenda and responses to the clarification questions?</p>	<p>Post all addenda and written responses to clarification questions to the same places where the RFSQ was posted, e.g. on MERX.</p> <p>The Consortium may also notify all registrants that an addendum has been posted.</p> <p>Appendix A of this guide provides a template structure for an addendum.</p>
<p>Referring to sub-section 3.3, what information would we offer at the Respondent Information Session?</p>	<p>An information session is conducted very soon after the RFSQ is issued e.g. within 5 days of the Date of Issuance and is used as an opportunity to inform interested Respondents about the opportunity and how to respond to the RFSQ.</p> <p>In advance of the Respondent Information Session the Consortium will prepare some “speaking notes” which will:</p> <ul style="list-style-type: none"> <li>• Outline the details contained in the RFSQ; and</li> <li>• Outline how to respond to the RFSQ e.g. the submission date, time and location (that any Submissions received after the Submission Deadline will be returned to the Proponent(s) unopened), the number of copies, etc.</li> <li>• A proposed structure / sample agenda for the information session would be to follow the structure of the RFSQ document: <ul style="list-style-type: none"> <li>○ General Introduction of the RFSQ process. The speaker should also mention that questions and answers will be recorded and posted on MERX and that it is the written responses that are official.</li> <li>○ Section 1: Overview</li> <li>○ Section 2: Background, particularly sections 2.1 and 2.2.2 of the RFSQ</li> <li>○ Section 3: Instructions, particularly 3.2, 3.4.1, and 3.4.2 of the RFSQ</li> <li>○ Section 4: Submission review process</li> <li>○ Section 5: Submission requirements, identifying key aspects of the response requirements such as the importance of responding to the mandatory and emphasizing the potential impacts if the Respondent does not respond to each of them (i.e. the Submission might be deemed non-compliant and disqualified)</li> <li>○ Introduce and review the Appendices</li> </ul> </li> </ul> <p>Adequate time should be given to cover the material. Since it is possible that some Respondents 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 Respondents 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 potential Respondents 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 Respondents.</p> <p>Appendix M to this guide provides a Sample Information Session Sign-in Sheet.</p>

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Question	Answer
Referring to sub-section 3.3, what is the best format for the Qualified Suppliers' Information Session?	<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 Respondents.</p> <p>When offering Respondents the option to participate via videoconference for an information session, IT staff should be available on-site to address any potential technical difficulties.</p>
Referring to sub-section 3.4.1: how many copies of the Submission should the Respondent provide?	Determine the number of copies based on the number of individuals on the Submission review team plus an extra copy e.g. if there are 3 members on the team, request 4 copies.
Referring to sub-section 3.4.1: what address do we insert for delivery of the Submissions?	<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. All Submissions must be date and time stamped by the Consortium at the time they are received.</p>
Referring to sub-section 3.4.1: there is a reference to a label in Appendix B, do we need to do anything with this label?	Yes, the Consortium should insert the details on the label which are <b>highlighted in red</b> i.e. the RFSQ number, the Submission Deadline and the location to which Submissions are to be delivered.
Referring to sub-section 3.4.4: why must Respondents use the <i>RFSQ Submission Template</i> ?	<p>The <i>RFSQ Submission Template</i> is provided for use by the Respondents. It is designed to make it efficient for Respondents to submit a response to the RFSQ; reduce the risk that they miss providing a response to a mandatory response requirement; and make it efficient for the Consortium to assess the Submissions for compliance.</p> <p>Respondents will contact the individual named in sub-section 3.2 to receive a copy of the <i>RFSQ Submission Template</i>.</p>
Referring to sub-section 5.4, the Consortium is to enter the timeframe for which during which services were provided?	Yes, for example the Consortium may determine that they want to know if Respondent provided student transportation services within the recent past for example within the last 5 years. The Consortium will decide on a timeframe that it believes is relevant.
Referring to sub-section 6.3 item #2, will the Consortium issue an RFSQ which is the same as the original RFSQ that we are issuing?	<p>Yes, on an annual basis the Consortium will issue an RFSQ which is the same as the original RFSQ but, first making any necessary revisions such as dates, the name of Consortium Representative, etc. as applicable to ensure it is accurate and current.</p> <p>The method the Consortium will post the RFSQ will be outlined in sub-section 6.3 to notify interested individuals and firms of the opportunity to be considered for inclusion on the Qualified Suppliers' List.</p>
Referring to Appendix A: we assume the Consortium modifies it as necessary to detail our regions and routes?	Yes that is correct. The Consortium may choose to provide potential Respondents with additional detailed information regarding the routes on the Consortium's website. The Consortium will include the website and any instructions needed to obtain the route information in Appendix A.
Referring to Appendix B: the Consortium completes the details <b>highlighted in red</b> ?	Yes that is correct.

**SECTION 4: ISSUING THE RFSQ**

Section 4 identifies various methods that can be used singly or in combination to inform potential Respondents of the RFSQ and the method by which the RFSQ should be issued.

Question	Answer
<p>Prior to the issuance of the RFSQ, what can we do to inform potential Respondents about the opportunity?</p>	<p>Prior to the release of the RFSQ the Consortium may post a Notice of Proposed Procurement (NPP) for the RFSQ to MERX. The NPP is a general notification to any interested parties of the Consortium’s intent to undertake a procurement process and the anticipated date the RFSQ will be posted to MERX. Appendix B of this guide provides a template NPP that the Consortium can modify for its process.</p>
<p>How do we issue the RFSQ?</p>	<p>The RFSQ must be posted to MERX (<a href="http://www.merx.com">www.merx.com</a>) to ensure that any entity that may be interested in providing student transportation services to the Consortium is aware of the opportunity.</p> <p>MERX is the public sector electronic bidding system.</p>
<p>If potential Proponents are not familiar with MERX is there a way that we can inform them about the process?</p>	<p>After the RFSQ has been posted to MERX, there are a number of methods that can be used singly or in combination to inform the market place about a procurement process for school transportation services.</p> <p>The methods that may be used to inform potential Respondents include:</p> <ul style="list-style-type: none"> <li>• local newspapers</li> <li>• the School Boards’ websites</li> <li>• contacting individuals and firms.</li> </ul> <p>Potential Respondents that identify the opportunity by the above methods will be directed to MERX to receive the RFSQ. Appendix C of this guide provides a sample newspaper ad that the Consortium can modify for its process.</p> <p>The Consortium out of courtesy may choose to contact potential Respondents to notify them of the procurement process. Appendix D of this guide provides a template letter the Consortium can mail or email to potential Respondents.</p>
<p>What if potential Proponents have problems accessing the RFSQ on MERX? Can we email the RFSQ to them directly?</p>	<p>If potential Respondents experience difficulty accessing the RFSQ, they are encouraged to contact the MERX support line at 1-800-964-6379. The Consortium may also provide potential Respondents with MERX registration instructions (Appendix E).</p> <p>No, the RFSQ will only be available to potential Respondents through MERX. This will ensure that all potential Respondents receive any future information (e.g. Addenda, responses to clarification questions) regarding the process.</p>
<p>How long should an RFSQ remain open?</p>	<p>The RFSQ can remain open for the period of time that the Consortium deems appropriate to ensuring that the Respondents will have sufficient time to prepare a quality response e.g. 25 calendar days.</p> <p>If potential Respondents 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 Respondents. Respondents will be informed of any extension by way of an addendum.</p>

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<p>If potential Respondents 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>	<p>Yes the Respondent Information Session referred to in sub-section 3.3 of the RFSQ Template is a very effective method of informing individuals and firms about the RFSQ process.</p> <p>It is recommended that the Consortium hold a Respondent Information Session very soon after the RFSQ 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 <i>Respondents' Information Session</i>.</p>
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**SECTION 5: ACTIVITIES DURING THE RESPONSE PREPARATION PERIOD**

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

Question	Answer
<p>What are we doing during the time that Respondents are preparing their Submissions?</p>	<p>If required, preparing addenda to make changes to the RFSQ or the RFSQ process. Any Addenda must be available to all potential Respondents to ensure that each of them has access to the same information by issuing addenda using the same method(s) used to issue the RFSQ.</p>
	<p>If required, preparing written responses to clarification questions submitted by Respondents. Any questions as well as the responses must be available to all potential Respondents 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 RFSQ.</p>
	<p>Getting ready for the Submission review process:</p> <ul style="list-style-type: none"> <li>• Selecting the review team members</li> <li>• Briefing the team members</li> <li>• Having them review and sign a Code of Conduct form</li> <li>• Preparing the Submission Compliance Checklist referred to in sub-section 4.1.1 of the <i>RFSQ Template</i> and provided in Appendix C of the <i>RFSQ Template</i>.</li> </ul>
	<p>The Consortium should monitor and keep track of the process, to ensure that all future communication (e.g. addendums, questions and answers, clarifications, etc.) have been issued and received by the potential Respondents. Appendix F to this guide is a sample control document format that the Consortium can modify for its own process.</p>
<p>When do we brief the review team?</p>	<p>The best time to brief the reviewers on their role and the Submission review process is immediately following the Submission Deadline.</p> <p>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 respondents 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 3.1 of the <i>RFSQ Template</i>. Sub-section 3.4.1 of the <i>RFSQ Template</i> specifies the address location where Submissions <b>must</b> 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 Respondent.</p>

**SECTION 7: THE SUBMISSION REVIEW PROCESS**

The Submission review process is followed to determine which Respondents will be selected for inclusion on the Suppliers’ List.

The review process is concerned with determining whether a Respondent has addressed each of the mandatory requirements in Section 5 of the *RFSQ Template*.

All Submissions received by the Submission Deadline will be reviewed in accordance with the process set out in the *RFSQ Template*, in the Section titled “Submission Review Process”.

Question	Answer
Who reviews the Submissions?	<p>The Consortium will establish a team to review the Submissions. The team members should have:</p> <ul style="list-style-type: none"> <li>• an understanding of the Consortium’s requirements for student transportation services, and</li> <li>• read the RFSQ document that was issued.</li> </ul> <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 review process. For example, if it is necessary to seek clarification about any of the Respondents’ Submissions during the review, 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 but, typically this individual does not complete a Submission Compliance Checklist.</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><b>It is important to ensure that none of the reviewers are in an actual conflict of interest.</b> The Code of Conduct is the form that facilitates the declaration of a conflict of interest. If any member of the review team is in a conflict of interest (potential or actual), they may be asked to step down and not participate in the evaluation.</p>
What materials will the Submission review team have to support the review process?	<p>A Review Training Session should be undertaken in advance of the review process to provide consistent direction to the team. Please refer to the RFSQ Review Training Guide as part of the Two-Stage resource package for guidance on material to be covered during the RFSQ Reviewer Training Session.</p> <p>The team will use an Evaluation Matrix that includes the Submission Compliance Checklist comparable to the one provided in the RFSQ Template to record the results of their review process. A checklist will be completed for each Submission. Appendix G to this guide is a template 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 review team to declare if they have a conflict of interest, real or potential. If any member of the review team is in a conflict</p>



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Question	Answer
	of interest, they may be asked to step down and not participate in the evaluation.
What does the Evaluation Matrix include?	The Evaluation Matrix includes the Submission Compliance Checklist that sets out the mandatory requirements provided in Section 5 of the RFSQ. It provides a space for the team member to indicate if the Respondent is complaint or non-compliant for each of the mandatory requirements. If the Respondent did not provide a response to any of the mandatory requirements, then the matrix provides a place for the team member to note this in the “Comments” column.
How do the team members review the Submissions?	<p>Each team member will review the responses that the Respondent has provided to the mandatory requirements.</p> <p>If the Respondent has provided a full and clear response, then the team member will record “C” for compliant, in the applicable space on the Evaluation Matrix.</p> <p>If the Respondent has not provided a full and clear response, then the team member will record “NC” for non-compliant, in the applicable space on the Evaluation Matrix and record comments in the “Comments” column to explain why the team member has recorded “NC” for a particular response.</p>
How will the review be conducted?	<p>The team lead will schedule a consensus session to be attended by all members of the team. The goal of the consensus session is to arrive at a final determination for each Submission through a discussion process.</p> <p>The team lead can act as the Chair for the consensus session and facilitate the discussion and help the team arrive at final agreed result for each Submission.</p> <p>The following procedure is typically followed at the session:</p> <ul style="list-style-type: none"> <li>• The team gathers in a room, with their materials – the RFSQ, the Submissions, and the completed Evaluation Matrix.</li> <li>• For each Submission, the team (in round table format) will state whether they found a response to be compliant or not with a particular mandatory requirement.</li> <li>• If evaluators have differing opinions as to whether a response is compliant, a discussion will ensue to resolve the differences with the intent to agree.</li> <li>• The final results, along with documented comments supporting the results, will be recorded on a Final Evaluation Matrix. A Final Evaluation Matrix is exactly the same as the form used by each team member but is titled the Final Review Record.</li> </ul>
What happens once the review process is complete and the final results have been recorded?	<p>The Consortium may decide to contact the customer that was provided by the Respondent in response to mandatory requirement 5.4 to validate that the information provided by the Respondent relative to the provisions of services to the customer on the Customer Contact Form is accurate.</p> <p>Create the Suppliers’ List to include the name and contact details for each of the Qualified Suppliers.</p> <p>Create a service area table to record which service areas, as presented in the RFSQ, each Qualified Supplier indicated interest in providing student transportation services. Appendix H to this guide is a template service area table that the Consortium can modify for its process.</p>

## RFSQ Procurement Guide

<b>Question</b>	<b>Answer</b>
	Notify the Respondents in writing to confirm if they have been included on the Suppliers' List. Do not provide any details in respect of their Submission or the results of the review process. Appendix I and Appendix J to this guide provide sample notification letters to successful Respondents and unsuccessful Respondents, respectively.

**SECTION 8: CREATION AND MAINTENANCE OF THE QUALIFIED SUPPLIERS' LIST**

This Section of the guide sets out the process for maintaining the Qualified Suppliers' List.

<b>Question</b>	<b>Answer</b>
When does the Qualified Suppliers' List get created?	The Qualified Suppliers' List is created at the completion of the review process. The names and contact details of the Qualified Suppliers will be included on the list.
What is the term of the Qualified Suppliers' List?	The Qualified Suppliers' List will be effective for four (4) years + the option to extend for two additional one-year periods from the date the List is created
Can we hire suppliers that are not listed on the Qualified Suppliers' List?	The RFSQ document clearly states that it is the Consortium's intent to invite suppliers that are on the Qualified Suppliers List to participate in the second stage competitive process.
How is the Qualified Suppliers' List maintained during the term?	The maintenance process is described in sub-section 6.4 of the <i>RFSQ Template</i> .

**SECTION 9: DEBRIEFING PROCESS**

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

A debriefing provides unsuccessful Respondents with an opportunity to understand why they were not selected and learn how they can improve the potential for success in a future procurement e.g. during the Suppliers’ List maintenance process.

Question	Answer
Who is entitled to a debriefing?	Any Respondent that has participated in the RFSQ process is entitled to a debriefing.
When are debriefings conducted?	Debriefings should be conducted within a reasonable time after the creation of the Qualified Suppliers List.
What triggers a debriefing?	<p>Once the notification letters to both successful and unsuccessful Respondents have been sent out, Respondents have sixty (60) calendar days following the notification letter date to request a debriefing session.</p> <p>Debriefings must be conducted individually for every Respondent who responds to the notification letter confirming their interest in a debriefing.</p> <p>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 K 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 Respondent.</p> <p>Copies of correspondence must be retained in the procurement file.</p>
Who should be involved in a debriefing?	<p>The review 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 Respondent’s interest in a debriefing, the review 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 review 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 review team member should meet prior to the debriefing session to:</p> <ul style="list-style-type: none"> <li>• Review the Submission;</li> <li>• Review comments noted during evaluation;</li> <li>• Review strengths and weaknesses of the Respondent’s Submission;</li> <li>• Discuss and agree on suggestions for improvement to be conveyed to the Respondent;</li> </ul>

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	<ul style="list-style-type: none"> <li>• Discuss potentially contentious issues and determine responses to them;</li> <li>• Ensure roles and responsibilities at the debriefing meeting are understood such as who will present /respond to questions at the debriefing; and</li> <li>• Identify the institution's Freedom of Information and Privacy Office contact information (it may be requested by the Respondent during debriefing).</li> </ul> <p>A debriefing script should be developed in advance for each Respondent 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 L 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"> <li>• Welcome of the Respondent;</li> <li>• Introduction of all parties in attendance and explaining their role in the procurement;</li> <li>• Stating the purpose of the meeting;</li> <li>• Reviewing the Respondent's Submission;</li> <li>• Opportunity for questions and answers; and</li> <li>• Formally closing of the debriefing session.</li> </ul>
<p>What information do we provide at the debriefing?</p>	<p>The objective of the debriefing is to be informative and helpful to the Respondents and to the outcome of the RFSQ process.</p> <p>The messages conveyed to the unsuccessful Respondents are supportive of this objective and may include:</p> <ul style="list-style-type: none"> <li>• General overview of the evaluation process;</li> <li>• Strengths and weaknesses of the Respondent's Submission;</li> <li>• Suggestions on how the Respondent's Submission may be improved in the future;</li> <li>• Specific questions and issues raised by the Respondent;</li> <li>• Feedback from the Respondent on current procurement processes/practices; and,</li> <li>• Information about the Qualified Suppliers List that has been shared publicly.</li> </ul> <p><b>No information is to be communicated about any other Respondent's Submission and their evaluation results.</b></p> <p>The Consortium should not provide the unsuccessful Respondent with any written material.</p>

APPENDIX A: ADDENDUM STRUCTURE

**ADDENDUM # > insert number**

**RFSQ # >insert number**

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

**Issue Date: > insert date**

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**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 RFSQ  
> insert amendments**

**END OF ADDENDUM # 1**

## APPENDIX B: NOTICE OF PROPOSED PROCUREMENT

### **Notice of Proposed Request for Supplier Qualifications (RFSQ) for School Bus Transportation Services**

#### SUMMARY OF REQUIREMENT

By means of this RFSQ, the Consortium >insert name will be undertaking a procurement process referred to as a two-stage competitive process for the acquisition of safe, effective and efficient student transportation services.

Stage one of the two-stage process will be initiated with the issuance of a Request for Supplier Qualifications (“RFSQ”).

It is anticipated that this RFSQ will be issued by > insert date.

Through this RFSQ, the Consortium will invite submissions from firms and individuals qualified to provide student transportation services in compliance with all applicable laws, regulations, standards and licensing requirements.

It is the intention of the Consortium to list each qualified supplier in a qualified supplier list (the “Supplier List”) which will have an initial term of >insert number of years with the option to extend for up to two additional one-year periods, at the discretion of the Consortium.

The Supplier List will be publicly available.

In stage two of the two-stage procurement process, the Consortium will invite only suppliers qualified as a result of stage one to respond to a Request for Services (“RFS”). The RFS will detail the specific requirements for student transportation and set out the process by which suppliers will be evaluated and selected for contract award.

#### ENQUIRIES

All enquiries concerning this RFSQ must be submitted in writing to the Consortium Representative identified below.

>insert the name, title and contact details of the Consortium Representative

#### ACCESSING THE RFSQ

Once the RFSQ has been posted, to receive the RFSQ, interested parties are encouraged to download it from MERX at [www.merx.com](http://www.merx.com), which is the public sector electronic bidding system.

APPENDIX C: NEWSPAPER AD

**Newspaper Ad**

**Request for Supplier Qualifications**

**RFSQ # > insert number**

The Consortium, >insert name, is undertaking a procurement process referred to as a two-stage competitive process for the acquisition of safe, effective and efficient student transportation services.

Stage one of the two-stage process is initiated with the issuance of a Request for Supplier Qualifications ("RFSQ"). Through this RFSQ, the Consortium invites responses ("Submissions") from firms and individuals ("Respondents") qualified to provide student transportation services in compliance with all applicable laws, regulations, standards and licensing requirements ("Qualified Suppliers").

It is the intention of the Consortium to list each Qualified Supplier in a Qualified Supplier List (the "Supplier List") which will have an initial term of **four (4) years** with the option to extend for up to **two additional one-year periods**, at the discretion of the Consortium.

In stage two of the two-stage process, the Consortium intends to invite Qualified Suppliers on the Supplier List to respond to a Request for Services ("RFS"). The RFS will detail the specific requirements for student transportation and set out the process by which suppliers will be evaluated and selected for contract award.

The RFSQ # > insert number opportunity is now available on MERX (public sector electronic bidding system) at [www.Merx.com](http://www.Merx.com).

For more information please visit the posting on the [www.Merx.com](http://www.Merx.com) website, or contact:

>insert the name, title and contact details of the Consortium Representative



## APPENDIX D: LETTER TO POTENTIAL RESPONDENTS

>Date

>Address of recipient

RE: RFSQ #> insert number

Dear, >insert potential Respondent's name

The Consortium, > insert name, is undertaking a procurement process referred to as a two-stage competitive process for the acquisition of safe, effective and efficient student transportation services.

Stage one of the two-stage process is initiated with the issuance of a Request for Supplier Qualifications ("RFSQ"). Through this RFSQ, the Consortium invites responses ("Submissions") from firms and individuals ("Respondents") qualified to provide student transportation services in compliance with all applicable laws, regulations, standards and licensing requirements ("Qualified Suppliers").

It is the intention of the Consortium to list each Qualified Supplier in a Qualified Supplier List (the "Supplier List") which will have an initial term of **four (4) years** with the option to extend for up to **two additional one-year periods**, at the discretion of the Consortium.

In stage two of the two-stage process, the Consortium intends to invite Qualified Suppliers on the Supplier List to respond to a Request for Services ("RFS"). The RFS will detail the specific requirements for student transportation and set out the process by which suppliers will be evaluated and selected for contract award.

The Consortium is pleased to inform your operation that our Request for Supplier Qualification (RFSQ) is available, as of > insert date, on the www.Merx.com website.

RFSQ #> insert number will only be available through the www.Merx.com website, as will any further documentation regarding our procurement process.

If you have difficulty signing on to the website, you may contact

- the Merx.com support line at 1-800-964-6379, or
- the Consortium Representative of the Procurement Process, > insert **the name, title and contact details of the Consortium Representative**

Thank you

> insert name

## APPENDIX E: MERX REGISTRATION INSTRUCTIONS

It is highly recommended that individuals receive assistance from MERX Customer Support by calling 1-800-964-MERX (6379). Subscription information and costs should be confirmed with MERX.

### Step A

- i. Open a web browser and enter [www.merx.com](http://www.merx.com) in the address bar at the top of the screen.
- ii. Locate the Register button at the top right side of the screen. Click the Register button to begin registration.

### Step B

Complete the four steps of registration. All information should be read thoroughly before moving on to the next step in registration.

#### Step 1 – Terms & Conditions

- i. Read the MERX Terms and Conditions
- ii. Click the checkbox “I accept the MERX Terms & Conditions”
- iii. Click on Next Step

#### Step 2 – Customer Profile

- i. Complete the Organization Information. Note that fields with an asterisk (\*) are mandatory.
- ii. The NAICS Industries for 4854 School and Employee Bus Transportation can be located by expanding the following items.
  1. 48-49 Transportation and Warehousing
  2. 485 Transit and Ground Passenger Transportation
  3. 4854 School and Employee Bus Transportation
  4. Click the checkbox beside 4854 School and Employee Bus Transportation
- iii. Click the checkbox beside to accept the MERX Terms & Conditions
- iv. Click on Next Step

#### Step 3 – Subscription Selection

- i. A Canadian Public Tender service is required. There are two types of subscriptions:
  1. Basic Tender subscription - The subscription is free. However, there will be a fee per order of approximately \$35.00. You would therefore have to pay each time you order documents from MERX. Any addendums, new postings or documents, and additional appendices after the initial order of document will cost approximately \$35.00 per order.
  2. Complete Canadian Tenders subscription - The subscription can be paid monthly or yearly. You will have unlimited access to order documents throughout the course of your subscription.
- ii. Private Tenders are not required for this opportunity, you may select Pay as You Go.
- iii. U.S. Tenders are not required for this service, you may select None
- iv. Private Construction Service is not part of the opportunity, you may disregard.

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- v. Automatic Transmission of Amendments is a subscription to receive amendments automatically when they are issued by the buyer organization.
- vi. Click on Next Step

### **Step 4 – Registration Summary**

- i. Review information
- ii. Enter payment method
- iii. Click on Complete Registration

**APPENDIX F: CONTROL DOCUMENT**

**RFSQ Control Document**

	Representative Name	Representative Contact Details	RFSQ		Information Session	Addenda 1		Addenda 2		Clarification 1		Clarification 2		Comments
			Date Received	Time 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														

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**APPENDIX G: RFSQ EVALUATION MATRIX**

**RFSQ Evaluation Matrix**

C = Compliant  
 NC = Non-compliant

Mandatory Requirements:	5.1 Respondent Profile			5.2 Service Area	5.3 Respondent Qualifications			5.4 Customer Contact Information		Date	Comments
	1. Name & address of organization	2. Name & contact details	3. Description of the ownership structure	1. Indicated interest in service area(s)	1. CVOR Level 2 (satisfactory)	2. Conflict of interest disclosure	3. Ontario Tax Compliance Declaration Form	1. Name & contact of a customer (last 3 years) & contract dates	2. Consent of the customer	INSERT DATE OF CONSENSUS SESSION	Reason why a response was deemed NC (e.g. CVOR not provided)
Operator 1	C	C	C	C	C	C	C	C	C		
Operator 2	C	C	C	C	NC	C	C	C	C		CVOR not provided
Operator 3	C	C	C	C	C	C	C	C	C		
Operator 4	C	C	C	C	C	C	C	C	C		
Operator 5	C	C	C	C	C	C	NC	C	C		Tax form not provided
Operator 6	C	C	C	C	C	C	C	C	C		
Operator 7	C	C	C	C	C	C	C	C	C		
Operator 8	C	C	C	C	C	C	C	C	C		

\_\_\_\_\_  
 Signature of the Authorized Official

\_\_\_\_\_  
 Print Name

\_\_\_\_\_  
 Title

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Signature of the Authorized Official

\_\_\_\_\_  
 Print Name

\_\_\_\_\_  
 Title

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Signature of the Authorized Official

\_\_\_\_\_  
 Print Name

\_\_\_\_\_  
 Title

\_\_\_\_\_  
 Date

**APPENDIX H: SERVICE AREA TABLE**

**RFSQ Consortium Service Areas**

Route	Route 1	Route 2	Route 3	Route 4	Route 5	Route 6	Route 7	Route 8	Route 9	Route 10	Route 11	Route 12	Route 13	Route 14	Route 15	Route 16	Route 17	Route 18	Route 19	Route 20
Operator 1	1	1				1				1	1	1				1				
Operator 2		1		1																1
Operator 3		1										1								
Operator 4		1									1									
Operator 5		1		1		1	1		1			1	1	1	1			1	1	1
Operator 6	1	1	1		1			1	1			1			1			1		
Operator 7		1			1		1			1										
Operator 8		1	1								1	1	1			1				
....																				
....																				
....																				
....																				
<b>Total</b>	2	8	2	2	2	2	2	1	2	2	3	5	2	1	2	2	1	1	1	2

APPENDIX I: SAMPLE NOTIFICATION LETTER TO SUCCESSFUL RESPONDENT

>insert date

>insert successful Respondent's name

>insert successful Respondent'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 RFSQ opportunity for inclusion on the Qualified Suppliers List. This letter is to advise that you were a successful candidate and will be included on the Qualified Suppliers List.

For Stage Two, the Consortium intends to invite Qualified Suppliers on the Supplier List to respond to a Request for Service. The Consortium will be contacting each Qualified Supplier directly.

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 RFSQ.

Yours truly,

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

> insert Consortium Contact phone number

> insert Consortium Contact email address

APPENDIX J: SAMPLE NOTIFICATION LETTER TO UNSUCCESSFUL RESPONDENT

>insert date

>insert unsuccessful Respondent's name

>insert unsuccessful Respondent'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 RFSQ opportunity for inclusion on the Qualified Suppliers List. This letter is to advise that you were not a successful candidate.

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 RFSQ.

Yours truly,

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

> insert Consortium Contact phone number

> insert Consortium Contact email address



APPENDIX K: SAMPLE DEBRIEFING CONFIRMATION LETTER

>insert date

>insert Respondent's name

>insert Respondent's address

Dear >insert name

Subject: Debriefing Notification regarding >insert RFSQ 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 RFSQ process. 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.

Yours truly,

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

> insert Consortium Contact phone number

> insert Consortium Contact email address

**APPENDIX L: DEBRIEFING TEMPLATE**

<b>Organization Name:</b>	>insert
<b>RFSQ # and Title:</b>	>insert
<b>Respondent’s Name:</b>	>insert
<b>Debrief Facilitator:</b>	>insert
<b>Respondent’s Representative Attendees:</b>	>insert
<b>Debriefing Date and Time:</b>	>insert
<b>Debriefing Location:</b>	>insert
<b>Organization Participants:</b>	>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 RFSQ for student transportation services.

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

We will begin with an explanation of the review process. Then provide comments regarding the review of your Submission against the mandatory 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 REVIEW PROCESS**

**Mandatory Requirements – Section 5 of the RFSQ**

- This is a process to verify that all the mandatory requirements were satisfied (pass/fail).
- All mandatory requirements were reviewed and Respondents that were compliant with all mandatory requirements were included on the Qualified Suppliers List.

**EVALUATION OF RESPONDENT’S SUBMISSION**

**Mandatory Requirements**

- >insert results (i.e. reason Submission was non-compliant)

**GENERAL SUGGESTIONS FOR FUTURE SUBMISSIONS**

- >insert general comments

**ASK FOR FEEDBACK ON THE RFSQ 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 M: SAMPLE INFORMATION SESSION SIGN-IN SHEET**

RFSQ Information Session for >insert Consortium's name

Date: >insert date

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