



Student Transportation Services: Request for Supplier Qualifications (RFSQ)

>insert consortium

RFSQ > insert number

Issue Date: > insert date

Submission Deadline: > insert date, 4:00:00 p.m. >insert time zone

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SECTION 1: GENERAL INFORMATION

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

Stage one of the two-stage process is initiated with the issuance of this 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 Service (“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.

>insert approximate timelines for Stage Two

SECTION 2: NATURE OF THE SERVICES

2.1 Background

The Consortium, comprising the school boards > insert the boards was established in >insert the date to facilitate collaboration among its members for the delivery of home to school student transportation services.

2.2 Transportation Service Requirements

2.2.1 Background:

> insert a detailed description of the following types of information:

- the size of the Consortium, number of students, number of buses,
- the importance of qualified operators, safety, policies and programs, need for value for money in the supply of transportation service i.e. what ever information the Consortium thinks is helpful to establish a context for this competitive process
- the annual student transportation budget for the Consortium
- a description of how the Consortium will use the Supplier List i.e. to invite Qualified Suppliers to respond to an RFS in stage two

> reference procurement policy

> reference historical declining enrolment

2.2.3 Vehicle Standards, Regulation and Licensing Requirements

All vehicles used for transporting students must be properly licensed and equipped according to currently applicable federal, provincial and municipal laws and regulations and, without restricting the generality of the foregoing, must comply with the requirements of the Public Vehicles Act.

2.2.4 Driver Licensing Requirements

The driver licensing requirements that all school bus drivers must have and maintain in good standing at all times are Class “B” or “E” as described below as well as any additional licenses required by the Public Vehicles Act, the *Highway Traffic Act* (Ontario) and local municipal by-laws.

Licensing Requirements	Description
Class ‘B’ license	Authorizes the driver to operate any school purposes bus having a designated seating capacity for more than 24 passengers
Class ‘E’ license	Authorizes a driver to operate any school purposes bus having a designated seating capacity for not more than 24 passengers
‘Z’ air brake license endorsement	Required to drive a motor vehicle equipped with airbrakes
Public Vehicle License	The Consortium must check with Ontario Highway Transport Board to determine any public vehicle licensing requirements http://www.ohtb.gov.on.ca/
> insert any other license(s)	

Licensing Requirements	Description
required by the <i>Public Vehicles Act</i> , the <i>Highway Traffic Act (Ontario)</i> and/or local municipal bylaws	

SECTION 3: INSTRUCTIONS TO RESPONDENTS

3.1 Schedule of Events

The Consortium intends to carry out this stage one procurement process in accordance with the schedule provided in the following table but may modify the schedule at any time in its sole discretion. If the Consortium decides to modify the schedule, Respondents will notified by way of an addendum

Events	Dates
Issuance of the RFSQ	>insert
The date of the Information Session	>insert
The date by which Respondents must submit Clarification Questions to the Consortium	>insert
The date the Consortium intends to publish any Addenda and Responses Clarification Questions	>insert
Submission Deadline	>insert date and time (same as cover page)
The date the Consortium intends to notify the Respondents of the results of the RFSQ process	>insert
Debriefing of non-selected Respondents	>insert

3.2 Respondent Clarification Questions

Respondents are responsible for requesting any clarification of the RFSQ documents. Respondents shall submit all requests for clarification as written questions, identifying the name of the Respondent, by e-mail to the Consortium representative (“Consortium Representative”) named below at the e-mail address indicated:

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

Any questions received by the Consortium after the date noted in the Events Table in sub-section 3.1 above may not be answered due to time constraints.

Clarification questions and responses as well as any addenda will be published by the Consortium using > insert the pertinent publication method(s) by the date noted in the Events Table above. Any and all addenda shall be part of this RFSQ. **In addition, the Consortium will forward any questions and responses as well as any addenda directly to all interested Respondents.** Respondents are responsible to ensure that they consider any addenda and responses in preparing their Submissions.

No oral questions will be accepted by the Consortium and no oral responses will be provided by the Consortium. The Consortium will assume no responsibility for any information provided orally to a Respondent.

Any communications on the part of any Respondent, or any of its employees, agents, contractors, subcontractors or representatives with respect to this RFSQ with anyone other than the Consortium may be grounds for disqualification, and the Consortium may, in its sole discretion, reject any potential or actual Submission to this submitted by that Respondent. For greater certainty (but without limitation) any Respondent who engages in any lobbying activities in relation to this RFSQ may be disqualified.

3.3 Respondent Information Session

To assist Respondents in understanding this RFSQ and the RFSQ process, the Consortium may, at its sole discretion, convene an information session, either in-person, via videoconference or teleconference, with the recipients of this RFSQ.

The Consortium Representative will notify the recipients of this RFSQ of the date and time of the information session.

3.4 Submission Requirements

3.4.1 Delivery

Respondents shall submit an original (prominently marked "Original") and **>insert number** copies of their Submission, in a sealed envelope, delivered either by hand or by courier, to the address noted below and not later than the date and time identified in the Submission Deadline in the Events Table provided in sub-section 3.1 above.

>insert the specific address location where the RFSQ Submissions will be received (as applicable, the street address, suite or floor number, municipality/city/town/township, postal code)

A label that Respondents can affix to the outside of their Submission envelope is provided in Appendix B of this RFSQ.

3.4.2 Late Submissions

Failure to submit a Submission by the Submission Deadline may render the Submission non-compliant and result in disqualification.

The Consortium shall reject and return *unopened* any Submission that is received after the Submission Deadline.

3.4.3 Clarification of Information provided in a Submission

The Consortium reserves the right to request and obtain written clarification or substantiation of information provided by a Respondent in their Submission.

If a Respondent fails to provide complete and accurate responses to the mandatory requirements set out in Section 5 of this RFSQ or fails to provide timely requests by the Consortium for clarification or substantiation of the information provided, that failure may result in disqualification of the Respondent's Submission.

3.4.4 Form of Submission

An RFSQ Submission Template containing the text of the mandatory response requirements in Section 5 **must** be used by the Respondents to prepare and submit their responses. The template is available by contacting the Consortium Representative.

Original Submissions must be signed and dated by an authorized official of the Respondent's organization.

3.5 Confidentiality

Any Submission and all correspondence, documentation and information provided to the Consortium in connection with or arising out of this RFSQ will become the property of the Consortium.

RFSQ Template

Respondents are advised to identify in their Submission any confidential information, the disclosure of which could cause them injury. Any such information in the Respondent's Submission that is not specifically identified as confidential may be treated as public information. The Consortium will take appropriate measures to protect information marked as confidential but, Respondents should note that such information may be subject to disclosure under the Freedom of Information and Protection of Privacy Act ("FIPPA") and the Municipal Freedom and Protection of Privacy Act ("MFIPPA"). All private information as defined by FIPPA and MFIPPA that may be provided in the course of this RFSQ (if any):

- a) is subject to the provisions of FIPPA and MFIPPA, and
- b) will be used by the Consortium exclusively for the purposes of this RFSQ.

The Consortium must publish the names of the qualified suppliers at the conclusion of this RFSQ process.

SECTION 4: SUBMISSION REVIEW PROCESS

4.1 Review and Selection Process

The Review Team will be responsible for evaluating Submissions received for this RFSQ process. The Review Team will be comprised of representatives from the Consortium and the Boards.

The Review Team will review each Submission to determine whether the Submission is compliant with the requirements of this RFSQ process, i.e. has the Respondent provided a response to each of the mandatory requirements set out in Section 5 of this RFSQ.

If the Respondent has provided a response to each of the mandatory requirements to the satisfaction of the Review Team, the Respondent will be included on the Supplier List.

The Consortium may, at its sole discretion, conduct any inquiries including contacting the customer contact provided by the Respondent to verify statements, documents and information submitted by the Respondent in connection with this RFSQ process.

A Respondent may be disqualified if the Consortium discovers that the Respondent has made any misrepresentations (i.e. statements that are not true) regarding any of the information provided by them in their Submission.

Respondents agree and acknowledge that the Consortium may, at its sole discretion, include or exclude a Respondent in accordance with the process set out herein.

No Respondent may make any claim whatsoever against the Consortium for any prejudice it may suffer by reason of its participation in or exclusion from this RFSQ or any subsequent RFS.

4.1.1 Submission Review Process

The Submissions will be reviewed as follows:

- The Consortium will review each Submission and determine if it has provided a response to each of the mandatory requirements. Appendix C provides a sample Submission Compliance Checklist that may be used by the Consortium to record the results of the Submission review process.
- The Consortium may, at its sole discretion, conduct any inquiries to verify the information contained in the Respondents' Submissions including contacting the customer reference provided by the Respondent. The failure or refusal of any Respondent to cooperate with any verification effort by the Consortium may result in the rejection of the Respondent's Submission.

Any Submissions that do not fully and accurately address each of the mandatory requirements will be disqualified.

4.1.2 Right to Waive

The Consortium may waive minor irregularities in a Respondent's Submission if they do not materially affect the qualifications of and the ability to provide student transportation services.

A minor irregularity means a deviation from the RFSQ requirements which affects form, rather than substance, and if such deviation is permitted or corrected the Respondent would not gain an unfair advantage over other Respondents. The Consortium may permit the Respondent to correct a minor irregularity.

A major irregularity means a deviation from the RFSQ requirements which affect the qualifications of and the ability to provide student transportation services and if such deviation is permitted, the

Respondent could gain an unfair advantage over competitors. The Consortium will reject any Submissions which contains a major irregularity. The classification of what is a major irregularity or a minor irregularity shall be the sole discretion of the Consortium.

4.1.3 Notification of Qualification

The Consortium will notify each Respondent, in writing, of the results of their Submission by the date identified in the Events Table in sub-section 3.1.

SECTION 5: SUBMISSION REQUIREMENTS

This Section sets out the mandatory requirements to which Respondents must provide a written response to be eligible for inclusion on the Supplier List. Failure to provide a response to a mandatory requirement will result in disqualification.

Respondents must use the Submission Template referenced in sub-section 3.4 above to prepare their Submission.

5.1 MANDATORY REQUIREMENT: Respondent Profile

The Respondent **must** provide the following information:

1. The name and address of its organization.
2. The name and contact details (phone number, fax number and email address) of an individual to whom the Consortium may direct questions about its response.
3. A description of the ownership structure of its organization e.g. sole proprietorship, incorporation, partnership and its directors and any related or associated companies, as defined by the Income Tax Act of Ontario, as applicable to the Respondent's organization.

NOTE TO RESPONDENT: This information will be used in stage two to apply the maximum percentage of routes that can be awarded to a Respondent. The proportion of routes provided by associated companies, as defined by the Income Tax Act of Ontario, even if the associated companies are each Qualified Suppliers, will be considered in aggregate in order to apply the Consortium's competition policy.

5.2 MANDATORY REQUIREMENT: Respondent Service Areas of Interest

The Respondent **must** provide the following information:

1. An indication of the service areas for which the Respondent would be interested in providing student transportation services. Refer to Appendix A for a description of the service areas.

NOTE TO RESPONDENTS: This information will enable the Consortium to determine if there are any service areas for which no Respondents has expressed an interest in offering student transportation services. Indicating the service areas in which you are interested in providing student transportation services will not preclude you from being invited to respond to an RFS for other service areas assuming the Proponent is a Qualified Supplier. This information will not be used to determine which Qualified Suppliers will be invited to respond to a stage two procurement processes. Qualified Suppliers will be able to respond to any competitive process undertaken by the participating Consortia.

5.3 MANDATORY REQUIREMENT: Respondent Qualifications

1. The Respondent **must** include a copy of its most recent **Commercial Vehicle Operator's Record (CVOR) Level 1** with a rating of "satisfactory – audited or unaudited" or better. Equivalent records i.e. a comparable document from a province other than Ontario, with a comparable rating of "satisfactory – audited or unaudited" or better will be accepted.
2. The Respondent **must** disclose any conflict of interest it may have in responding to this RFSQ or in responding to a subsequent RFS in stage two of the overall two-stage procurement process. For the purpose of this RFSQ, conflict of interest may arise if a Respondent has access to confidential information about this RFSQ or any subsequent RFS that is not available to all other Respondents thereby giving the Respondent an unfair competitive advantage.

The Consortium reserves the right, at its sole discretion, to:

- a) determine whether a conflict of interest exists;
 - b) disqualify any Respondent on the basis of such conflict of interest; or
 - a) prescribe the manner in which a conflict of interest will be resolved, managed or mitigated.
3. The Respondent **must** submit the Ontario Tax Compliance Declaration Form provided in Appendix D of this RFSQ.

5.4 MANDATORY REQUIREMENT: Customer Contact Information

1. The Respondent **must** provide the name and contact information of a customer to whom the Respondent provided home to school student transportation services within the last **x** years **> insert** as well as the contract start and end dates.
2. The customer contact provided **must** be the signatory party to the contract.
3. The the Respondent **must** obtain the consent of the customer to act as a contact on behalf of the Respondent.

NOTE TO RESPONDENT: The Customer Contact should be from school boards / Consortia other than **>insert Consortium's name** or its member school boards. If the Respondent has only provided home to school transportation services for the Consortium, Respondents may note this in their Submission and use the Consortium as their Customer Contact.

SECTION 6: TERMS AND CONDITIONS OF THIS RFSQ

6.1 Costs Incurred by Respondents

The Consortium shall not be responsible for any liabilities, costs, losses or damages incurred, sustained or suffered by an interested party, prior to or subsequent to or by reason of qualification or non-qualification by the Consortium of any Respondent or by reason of delay in the qualification of any Respondent.

6.2 Consortium Rights

1. The Respondent acknowledges and agrees that these RFSQ documents are in no way whatsoever an offer to enter into an agreement for the provision of student transportation services. The submission of a response by any Respondent does in no way whatsoever create a binding agreement or any other rights as between the Consortium and a respondent. For greater certainty but without limitation, this RFSQ process is not intended to create a bidding contract (also known as "Contract A").
2. The Respondent acknowledges that inclusion on the Supplier List is not a guarantee that they will be awarded a contract in a subsequent competitive process.
3. The Respondent acknowledges and agrees to provide at the Consortium's request, a copy of the Respondent's CVOR Level 2, for this RFSQ process or any subsequent Stage Two process.
4. Without limiting the generality of the foregoing, the Consortium may take the following actions and shall not be liable for any prejudice suffered by anyone as a result of any such actions:
 - a) reject or accept any Submission;
 - b) reject all Submissions;
 - c) cancel this RFSQ process at any time for any reason.
3. This RFSQ process does not, in any way whatsoever, obligate the Consortium to undertake a stage two competitive process, call upon any supplier qualified as a result of this RFSQ process nor limit the ability of the Consortium in any subsequent RFS for student transportation to accept proposals from any respondent, regardless of its participation or evaluation in this RFSQ.

6.3 Material Changes

Each Respondent shall inform the Consortium of any material change in information that might affect its prequalification status which occurs at any time after the Submission Deadline, no later than 10 days after the occurrence of the material change. Material changes include, but are not limited to, a change in ownership or bankruptcy.

In a subsequent competitive process, Qualified Suppliers will be required to update key information at the time of RFS proposal submission. Prior to contract award, the successful Supplier will be required to confirm its status.

6.4 Maintenance of the Supplier List

1. It is the intention of the Consortium to update the Supplier List annually:
2. On an annual basis, the Consortium will post a notice of opportunity on its website (> insert the Consortium web site). At that time, individuals or firms who wish to be considered for inclusion on the Supplier List may submit a response to the RFSQ for evaluation. Individuals or firms who meet the requirements set out in the RFSQ may be added to the Supplier List.

3. Qualified Suppliers can expect to remain on this Supplier List for the entire term unless:
 - (i) a Qualified Supplier requests to have its name removed from the Supplier List;
 - (ii) a Qualified Supplier notifies the Consortium, on an annual basis and in accordance with instructions provided by the Consortium, that it has undergone a material change in circumstances and in the sole opinion of the Consortium such material change in circumstances affects the Qualified Supplier's compliance with the mandatory requirements of this RFSQ .

6.5 Contracting with Suppliers on the Supplier List

1. No contract will be awarded as a result of this RFSQ process.
2. The Consortium may, at its sole discretion, undertake a stage two competitive process or processes following this RFSQ process by inviting Suppliers on the Supplier List to participate in a competitive process. A contract may be awarded to the successful Supplier or Suppliers based on the evaluation and selection process that will be published in the Request for Service (RFS).

6.6 Debriefing

Respondents may request a debriefing after receipt of the notification of the results of the RFSQ process. All requests must be in writing to the Consortium Contact and must be made within sixty (60) days of the notification letter. The intent of the debriefing information session is to aid the Respondent in presenting a better Submission in subsequent procurement opportunities. The Consortium will not share information about other Submissions during a debriefing or engage in comparing the contents of different Submissions.

APPENDIX A: CONSORTIUM SERVICE AREA(S)

>Enter description of the regions and routes for which student transportation services may be competed in stage two

APPENDIX B: SUBMISSION LABEL

The Respondent should affix this label to its Submission envelope.

RFSQ NUMBER: >insert number

SUBMISSION DEADLINE:

Closing Date: >insert closing date

Closing Time: >insert closing time (local time)

Submission Receiving Address: >insert the specifics of the address to which the Respondents must deliver their Submissions (this will be the same address as provided in sub-section 3.3 of the *RFSQ Template*)

Respondent to complete the following:

(Full legal name and address)

NAME: _____

ADDRESS: _____

CONTACT: _____

TELEPHONE #: _____

TO:

>insert Consortium

>insert Address where Submissions will be delivered/received

NOTE:

The onus remains solely the responsibility of the Respondent to instruct couriers/delivery personnel to deliver Submissions to the exact location specified above by the Submission Deadline. Respondents assume full responsibility for late deliveries if these instructions are not strictly adhered to.

APPENDIX C: SUBMISSION COMPLIANCE CHECKLIST

The selection team will review each Submission and record if it has provided a response to each of the mandatory requirements in Section 5 of this RFSQ using a form similar to the sample form provided in this Appendix.

Name of the Respondent:				
Req't #	Mandatory Requirement	Response Requirements	Response Included?: Record yes or no, as applicable	Comments e.g. document what if any clarification of a response is required
5.2	Respondent Profile	1. The name and address of its organization		
		2. The name and contact details (phone number, fax number and email address) of an individual to whom the Consortium may direct questions about its response		
		3. A description of the ownership structure of its organization e.g. sole proprietorship, incorporation, partnership and its directors and related companies		
5.2	Respondent Service Areas	An indication of the regions, routes for which the Respondent would provide student transportation services. Refer to Appendix A for a description of the region, routes for which student transportation services may be competed in stage two		
5.3	Respondent Qualifications	1. The Respondent must include a copy of its most recent Commercial Vehicle Operator's Record (CVOR) Level 1 with a rating of "satisfactory – audited or unaudited" or better. Equivalent records i.e. a comparable document from a province other than Ontario, with a rating of "satisfactory – audited or unaudited" or better will be accepted.		
		2. The Respondent must disclose any conflict of interest it may have in responding to this RFSQ or in responding to a subsequent RFS.		
		3. The Respondent must submit an Ontario Tax Compliance Declaration		

RFSQ Template

Name of the Respondent:				
Req't #	Mandatory Requirement	Response Requirements	Response Included?: Record yes or no, as applicable	Comments e.g. document what if any clarification of a response is required
		Form provided in Appendix C of the RFSQ.		
		4 (i). Contact information for a customer for whom the Respondent has provided school bus transportation services within the last X years.		
		5. An authorized official to sign and date Submission.		

APPENDIX D: TAX COMPLIANCE DECLARATION FORM

Respondents are advised that any contract with the Consortium will require a declaration from the successful respondent that the respondent's provincial taxes are in good standing.

In order to be considered for a contract award, the respondent must submit the following tax compliance status statement and the following consent to disclosure:

Declaration

I/WE hereby certify that _____ at the time of submitting its Submission,

(legal name of Respondent)

is in full compliance with all tax statutes administered by the Ministry of Revenue for Ontario and that, in particular, all returns required to be filed under all provincial tax statutes have been filed and all taxes due and payable under those statutes have been paid or satisfactory arrangements for their payment have been made and maintained.

Consent to Disclosure

I/We consent to the Ministry of Revenue releasing the taxpayer information described in this Declaration to the Consortium issuing the RFSQ as necessary for the purpose of verifying that I/we am/are in full compliance with all statutes administered by the Ministry of Revenue.

Dated at this day of 20

(An authorized signing officer)

(Print Name)

(Title)

(Phone Number)

(Fax Number)