These instructions are to complete the Purchasing Services Initiation Form following these instructions. This document will provide information to aid in the development of the requirements, specifications, weighted criteria and the questionnaire for the RFx Posting Document. If any area does not apply to your project, please indicate that this section is not applicable (N/A).

**Section 1.1 Background Information**

Please create a brief description of your department and what you do. Many departments have already created introductory information that is approved for use in external communications. Purchasing Services in some cases may provide this information. If additional or more specific information is required add as item 1.1.2 following the selected introduction.

The following table, should be considered in conjunction with the Purchasing Officer to provide Proponents with knowledge of UVic’s timeline for the RFP process. If scheduling Site Visit, Demonstration, or Presentation consider the following in the development of the schedule; site availability, client and technical availability and allow enough time in the schedule for the supply community to prepare and attend. If time allows multiple dates can be provided.

|  |  |
| --- | --- |
| **Activity** | Date |
| RFP Issue Date | Posting date |
| Proposal Submission Deadline | Typically 3-6 weeks dependant on complexity |
| Site Tour/Demonstration/Presentation (Optional) | As per instruction above |
| Estimated Evaluation and Review of Proposals | Usually 1-2 Weeks, some what dependant on complexity |
| Selection of Lead Proponent | 2 days post evaluation review |
| Final Contract Execution | Usually 1-2 Weeks – Dependent on the complexity of the negotiation |
| Estimated Debriefing with unsuccessful Proponents (if required) | Following Contract Execution |

**Section 1.2 Purpose**

Provide description of the project or requirement please keep in mind the purpose should answer the following questions:

1. **The nature of your project?**
2. **The deliverables?**
3. **The expected outcomes?**
4. **Timeline expectations?**

**Section 1.3 Scope of Work -Technical Specifications**

Specification refers to a description of the characteristics of a commodity or service required or desired. Specifications set forth the characteristics of the goods and services to be purchased so as to enable the vendor to determine and understand that which is to be supplied. This information may be in the form of a description of the physical, functional, or performance characteristics, a reference brand name or both. It may include a description of any requirement for inspecting, testing, or preparing a material, equipment, supplies, or service for delivery.

**Section 1.4 Warranty & Maintenance (Optional)**

If you have a minimum requirement for warranty coverage, please indicate the number of years of coverage you are looking for. Please indicate if you require coverage for parts, labour, and service support.

When purchasing software indicates the number of years of maintenance you would require.

**Section 1.5 Product Demonstrations (Optional)**

Please indicate if a product demonstration is required and if so what format is preferred, for example, via webinar or on campus presentation. On what basis will a demonstration be required? If a demonstration is required will all proponents be asked to prepare a demonstration? If the intent is to short list, how many proponents would be selected to provide a demonstration? What time frame would be given to the proponents to prepare and give the demonstration?

**Appendix 1-2 Proposal Evaluation Criteria & Schedule 3-2 Questionnaires**

For the purpose of this document, the Evaluation Criteria and the Questionnaire have been combined. The intention is to ensure that the questionnaire will obtain a response from the supply community that will enable the Evaluation Committee to score the submission and determine the ranking of the proponents that have entered submissions. The questions and criteria will be directly related to the objectives, requirements and specifications. Rather than automatically accepting the lowest price, the evaluation process applies weighting for skills, quality, experience and previous performance in a manner to ensure value for money.

The Primary Weighted Criteria are identified in the shaded areas. These selected criteria will reflect the critical elements of the project. The overall percentage for the Primary Weighted Criteria is indicated in the Weight Column. The requirements of the project and level of importance will help to adjust the total weights accordingly. A basic sample has been provided, however, these criteria and weights should be defined by the project owner.

Provide a weight (%) for each category. Feel free to add categories as required to best suit the project. Ideally, the category with the heaviest weight should be the most important.

The weight % for each category will now be divided among the questions created for those categories in the questionnaire (the individual weights are not posted in the competition document. This is for information only and aids in the understanding of the scoring of the submissions).

Samples for the questions and have been provided under each of the headings. It is important to add questions that will allow you to evaluate the submission based on the requirements set out in the specifications. Please change/add questions that will be scored and will become part of the future evaluation of the submissions.

*NOTE: These criteria will be used in the evaluation of the submissions and will determine the leading proponent. It is highly recommended that this area be carefully reviewed since it will determine the result of the RFP. The individuals who are chosen as the Evaluators must be able to assess the responses and have the expertise to score the information based on each category.*

**Evaluation Team**

A minimum of three people are required to score an RFP. You may have more if you feel that it is necessary but the total number of people on a team should equate to an odd number (3, 5, 7). Note: The evaluation teams may be divided depending on the complexity of the project or the equipment being procured. For example, Product Functionality may be evaluated by the technical experts in the group; while pricing and value add can be evaluated by only the Principle Investigator

Please forward the names, titles and email addresses of your evaluation team to the Purchasing Officer managing your RFP.

**Project Initiation Form**

**The following pages will help to form Appendix 1-1 Requirements, Appendix 1-2 Evaluation Criteria & Schedule 3-2 Schedule of Prices in the RFx Document. Please follow the instructions provided above. If at any time you are having difficulty, please contact Purchasing Services.**

**APPENDIX 1-1 REQUIRMENTS**

* 1. **Back Ground Information**
  2. **Project Description & Purpose**
  3. **Scope of Work - Technical Specifications**
  4. **Warranty & Maintenance**

**Appendix 1-2 Proposal Evaluation Criteria & Schedule 3-2 Questionnaire**

|  |  |
| --- | --- |
| Evaluation Criteria | Weight |
| Proponent Qualifications: | 20% |
| Please provide an executive summary. | 5 |
| Please provide details on the organizations presence in BC | 5 |
| Please provide resumes for any personnel that will provide service & support. | 10 |
|  |  |
| Services & Deliverables: | 40% |
| Please describe how your proposed system meets the technical and product functionality required. | 15 |
| Please describe how you have provided equipment similar in size and scope to other universities or organizations that are similar to UVic. | 15 |
| Please describe how you will support the installation and operation of the system, including training and/or any other technical support. | 10 |
|  |  |
| Pricing: | 30% |
| Pricing provided in Schedule 3-2 | 20 |
| CFI discounts or educational discounts that may be applicable. | 5 |
| Please provide details of your warranty. | 5 |
|  |  |
| Overall Suitability: | 10% |
| Please provide additional details that would differentiate your organization or solution over the others. . | 10 |

* 1. Evaluation Team:

|  |  |  |
| --- | --- | --- |
| **Name** | **Title** | **E-mail Address** |
|  |  |  |
|  |  |  |
|  |  |  |