

HEQCO REQUEST FOR PROPOSAL (RFP) INSTRUCTIONS

PROPOSAL SUBMISSION INSTRUCTIONS

Proposals are to be submitted according to the following method:

1. **Proposal submission must contain one (1) electronic copy of:**
 - a. **Proposal Response Template** in Microsoft Word format or PDF, signed by an authorized representative. Electronic signatures are valid.
 - b. **Appended documents** in Microsoft Word format or PDF.
 - c. **Tax Compliance form**, if applicable.
2. The Proposal Response Template and all corresponding appendices must be fully completed in order for your submission to be considered for evaluation.
3. Proposals must be sent electronically to rfp@heqco.ca and received by the proposal submission deadline date and time (EDT). **It is the responsibility of the bidder to ensure that the RFP reaches HEQCO by the date and time cited in the Proposal Response Template. Proposals received after the deadline will not be considered.**

Correspondence

All correspondence, including questions relating to this RFP must be submitted to RFP@heqco.ca. Please quote the RFP# in your correspondence.

If HEQCO determines that additional information (e.g. questions and responses and/or addenda) relating to this RFP should be provided, such information will be sent to all vendors by e-mail and/or posted on the HEQCO website. This information is considered part of the RFP, and may modify certain terms and conditions of the original document.

Vendors are responsible for providing HEQCO with the correct e-mail address to which any additional information or addenda should be sent.

WORK ASSIGNMENT COSTS

Research Project Budget

The submitted proposal is to include all professional fees and materials necessary for the completion of the Assignment. The bidder must provide a detailed breakdown of the following costs in the **Research Budget** section of the **Proposal Response Template**.

The Research Budget section must include detailed information on:

- i. **Personnel** – salaries and benefits or stipends, specified by rate and time required.

Note: HEQCO has introduced guidelines that do not allow for daily or semester rates to be charged for faculty and senior administrators who are involved in HEQCO-funded research projects. These charges should be considered in-kind contributions and reported as such.

In exceptional circumstances, if a teaching release is required to provide backfill for a faculty member or administrator involved in the research project, HEQCO will fund the hiring of a part time instructor at the college/university in question at the prevailing per semester rate.

- ii. **Direct costs** – actual costs incurred (if applicable), e.g. specialized supplies, equipment leases, software and incentives for participation.

Note: HEQCO strongly discourages the purchase of equipment that is to be used for research projects. However, HEQCO will reimburse the contractor/institution for the period during which leased equipment will be used for completing the research.

HEQCO will also reimburse for the costs of incentives for participation in research (e.g. gift cards and prizes for survey participation). For focus groups, the maximum charge is \$100 per focus group.

- iii. **Travel** – indication of number of trips and costs, including accommodation (if applicable).

Note: HEQCO will not reimburse contractors for the following: meals, snacks, beverages, gratuities, laundry, dry cleaning, valet services, dependent care and personal telephone calls. Also, HEQCO is only able to reimburse economy class travel.

- iv. **Overhead** – HEQCOs approved overhead rate is 10%

Note: An amount for overhead (if applicable) may be allowed if the contractor is an institution and researchers will have use of space and resources, such as computers, copiers, printers, at the institution.

Overhead will be applied to personnel costs, direct costs and travel costs. This means that the 10% overhead will be applied to the entire HEQCO funded portion of research budgets for projects. If travel costs are included in the budget and 10% overhead is paid on them, institutions must be able to verify and document the overhead costs.

Milestone Payments

Payment of firm fixed prices will be made by milestone payments against invoices submitted upon completion of the deliverables and acceptance of deliverables by HEQCO. Please note that should your proposal be successful and awarded a contract, 40% of the HEQCO funded portion will be withheld until acceptance of the final deliverable. This 40% will be split into two equal payments: one payment is released upon acceptance of a final draft; the second after copyediting is completed. Note, copyediting will be handled and costs paid by HEQCO.

Harmonized Sales Tax (HST)

On July 1, 2010, the Province of Ontario implemented the Harmonized Sales Tax (HST). In the past, the government was exempt from payment of GST, but will be paying HST on affected purchases after July 1, 2010.

EVALUATION OF PROPOSALS

The evaluation of proposals is carried out by an evaluation team and can be composed of HEQCO employees or a combination of both internal and external personnel. Proposals are evaluated in two phases.

In stage one, evaluators use the evaluation rubric (outlined in the Proposal Response Template) to evaluate the proposals and rank them for further evaluation and/or disqualification.

In stage two, the successfully ranked proposals are evaluated using the references provided. This includes past performance on HEQCO funded research projects (if applicable) and the non-HEQCO references bidders' are required to provide. Non-HEQCO references can include references for the organization as a whole, or for individual team members. **Please note that having no past work experience with HEQCO will not negatively influence the evaluation.**

Final decisions are a combination of the evaluation rubric score, HEQCO's own assessment of past work with the bidder (if applicable) and feedback non-HEQCO references provide.

Pricing Evaluation of Proposals

A component of the evaluation is based on a relative pricing formula using the Firm Fixed Price set out in the **Research Budget** section of each submission. Each bidder will receive a percentage of the total possible points allocated to the total price (HST excluded) it has bid, by dividing that bidder's total price into the lowest total price that was proposed.

For example, if the lowest total bid price for a particular category is \$120, that bidder receives 100% of the possible points for his total price ($120/120 \times 10 = 10$ points), a bidder who bids a total price of \$150 receives 80% of the possible points for his total price bid ($120/150 \times 10 = 8$ points) and a bidder who bids a total price of \$2100 receives 5.7% of the possible points for his total bid price ($120/2100 \times 10 = 0.57$ point).

Based on the example above:

Lowest Total Price ----- Lowest Total Price	$\times 10 = 10$ Points for proposal with the lowest price
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Lowest Total Price ----- 2 nd Lowest Total Price	$\times 10 = 8$ Points	For the proposal with 2nd lowest total price
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Lowest Total Price ----- 3 rd Lowest Total Price	$\times 10 = 0.57$ Points	For the proposal with 3rd lowest total price
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STAGE TWO: References

1) Past Funded Research with HEQCO (if applicable)
2) Non-HEQCO References for Organization and/or Individual Research Team Members

ADMINISTRATION

- HEQCO may extend the Proposal Submission Deadline for a reasonable amount of time.
- Although HEQCO will take care in the preparation and provision of information or addenda in relationship to this RFP, the organization will not be responsible for any delay, damage, loss or inconvenience that may be incurred in the event of technical malfunction or administrative error, without limitation.
- HEQCO reserves the right to accept, modify or reject all or part of the submitted proposal.
- The lowest priced bid may not necessarily be selected.
- HEQCO reserves the right to cancel or change this RFP at any time without penalty.
- HEQCO reserves the right not to award any contract.
- There will be no payment for responding to this RFP.
- All information obtained by the Vendors in connection with this Request for Proposal is the confidential property of HEQCO. It must not be used for any other purpose other than replying to the Request for Proposal and fulfilling any subsequent contract, if awarded.
- All information received by HEQCO from the Vendors, in connection with this Request for Proposal, will be retained for disclosure under established procedures. Under the Freedom of Information and Protection of Privacy Act, HEQCO cannot guarantee the confidentiality of submitted information. Any proprietary or confidential information should be identified as such and any desired treatment indicated in the submission.

The successful Vendor selected for this Assignment will be required to sign an agreement. The sample agreement template can be reviewed at HEQCO website at: <http://www.heqco.ca/SiteCollectionDocuments/Long%20Form%20Contract%20Template.pdf>

For all answers to questions or clarifications please go to the following link: <http://heqco.ca/en-CA/Research/Requests%20for%20Proposals/Pages/Home.aspx>
 Answers will be posted approximately three business days after the deadline. They will also be emailed to all proponents who have requested a copy of the RFP.

No Liability

HEQCO is not liable for any expenses, costs, losses or any direct or indirect damages incurred or suffered by any Vendor or third party resulting from HEQCO exercising its expressed rights under this RFP or exercising any rights, which may be implied in the circumstances.