

**Use this template when requesting invitational proposals from consultants for services under \$75,000.**

*If fees are estimated to be \$65,000 or greater, a limited solicitation process should likely not be used and the process for over-threshold procurements should be followed.*

**General Instructions:**

**How to use this template:** Enter information wherever you see blue placeholder text. Do not change margins. Do not change header/footer content.

**Formatting Note:** This template uses styles to keep formatting consistent. Please use styles to format any content you may add to the document. To display a list of styles, click in the corner of the Quick Styles area of the Home tab on the Ribbon.

**Removing editing notes:** When the document is complete, **remove** the editing notes.

**REQUEST FOR PROPOSALS (RFP)**

for

**CONSULTANT SERVICES**

for

**Enter Project Name and Location**

Contract No.: **Enter Contract Number**

Work Activity: **Enter WAC or leave as N/A**

RFP Closing Date and Time: **Select a date** at 11:30 p.m. Alberta time.

Proposal Submission and Inquiries Contact:

Email Contact: **Enter Name, Title**

Email Address: **Enter.Name@gov.ab.ca**

## 1. PROJECT OVERVIEW

1. Provide an overview of the project including objectives.

## 2. SERVICES SCOPE AND DELIVERABLES

1. Provide a full description of the scope of Services to be provided, including deliverables, milestones, and timelines. You can also list the services below.
  1. [Click here to enter services](#)
  2. [Click here to enter services](#)
  3. [Click here to enter services](#)
  4. [Click here to enter services](#)

## 3. QUALIFICATIONS

**Editing Note:** If mandatory or desirable requirements for qualifications are required (e.g. Minimum 5 years experience using Sharepoint), the clause below and Appendix A will require revision to incorporate these requirements. You may want to consult with Strategic Procurement Branch to ensure your requirements are appropriately incorporated.

Since this is a Limited Solicitations and therefore invitational, there should be less need for mandatory requirements as Proponents are being specifically selected to submit proposals

1. Proponents must demonstrate that their team member qualifications can deliver the service requirements noted above. Proposed team members to be identified in Appendix A (Proposal Template).

## 4. FEE PROPOSAL

1. The Proponent shall propose their fee in Appendix A - Proposal Template, attached.

## 5. PROPOSAL EVALUATION

**Editing Note:** Use the following clause for Fee Based Proposal submissions, otherwise delete.

Fee Based Evaluations are not typically used for consulting services unless the scope of work is straightforward, deliverables are clearly defined, and there is no benefit in evaluating/differentiating between who is involved and how services are to be delivered. If you are not sure which fee model to use, contact Strategic Procurement Branch for advice.

1. Proposals shall be evaluated on the fee Proposal submissions and the successful Proponent will be selected based on lowest compliant fee Proposal.

*OR, If using a value based selection, use the following and modify it as required. Select the 'Evaluation Categories' that are deemed necessary, make sure to coordinate Appendix A 'Proposal Template' accordingly.*

2. A "value based selection" process will be employed for this procurement. This means that the successful Proponent will be the one whose Proposal offers best value, taking into consideration both qualifications and price.

EVALUATION CATEGORIES		WEIGHT
1.	Project Comprehension	10 – 40%
2.	Project Team	10 – 40%
3.	Past Performance <b>OR</b> Relevant Experience	30%
4.	Fee	20%
<b>TOTAL:</b>		<b>100%</b>

## 6. PROPOSAL FORMAT

1. Proponents may submit their Proposal using Appendix A - Proposal Template, attached. Proposals may be submitted in other formats provided that they include a response to the requirements identified in Appendix A - Proposal Template and in order of the stated requirements.
2. Proponents should limit their proposals to **3** single-sided, 8½" x 11" pages or equivalent (e.g. 11" x 17" for charts, schedules, etc. count as 2 pages).
  - a. The page limit **excludes** a cover letter, table of contents and individual's resumes.
  - b. Proponent should use an easy to read font type and size, such as 11 point Arial or 12 point Times-Roman.

## 7. SHORT FORM INVITATIONAL RFP ADMINISTRATION TERMS AND CONDITIONS

1. The Short Form Invitational RFP Administration Terms and Conditions form part of this RFP and are accessible through the following link:  
<https://www.alberta.ca/consulting-services-contract-templates.aspx>.
2. Proponents, by submitting a Proposal, are deemed to have accepted the Short Form Invitational RFP Administration Terms and Conditions.

## 8. CONTRACT PROVISIONS

1. Proponents, by submitting a Proposal, are deemed to have accepted each of the provisions of the Contract accessible through the following link  
<https://www.alberta.ca/consulting-services-contract-templates.aspx>, as drafted (if the value of services is less than \$30,000 a Professional / Technical Services Contract will

be used and for \$30,000 or greater a Consulting Services Contract will be used). Schedules (if any) to the Contract and any blank items will be completed by the Province when preparing the Contract to be entered into with the successful Proponent.

**Editing Note:** Identify if COR **WILL** or **WILL NOT** be required as a requirement during the proposal state and/or of contract award. If not, delete clause 3.

2. The Consultant must possess a valid Safety Certificate of Recognition (COR) from the Alberta Construction Safety Association (ACSA) or approved equivalent which is relevant to their industry, in order to enter into a consulting services contract with the Department and must maintain a valid COR for the duration of the Contract . For Consultants who have not obtained a COR, a valid Temporary Letter of Certification (TLC) or Certificate of Recognition Equivalency Letter (COREL), either as issued by the ACSA will be considered acceptable. Failure to comply with this requirement will result in disqualification. A small employer's certificate of recognition (SECOR) is not considered acceptable by the Department.
3. No price escalation/de-escalation factor will be applied to outstanding fees.

## 9. INQUIRIES

1. Inquiries regarding this RFP must be submitted to the individual identified as the Inquiries Contact on the cover page of this RFP. Refer to article 3 - Proponent Questions and Communications, of the Short Form Invitational RFP Administration Terms and Conditions for additional information.
2. When submitting inquiries by email, identify the RFP title and Contract No. in email subject line.

## End of Short Form Invitational RFP – Instructions

**Editing Note:** Once the RFP is completed, Remove the Editing Notes and pdf the document before issuing it to invited Proponents