

# RFP WORKSHOPS

Supporting Ontario's School Bus Operators  
RFPs in Wellington-Dufferin & York  
November 22, 2009

Resources provided by the Ministry of Education



**DIJON GROUP**  
the power of uncommon sense

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- Worked with OSBA on the contracting practices file since December 2007
- Founding partner Dijon Group, Epiphany Branding
- Expertise in strategic and organizational analysis & planning, communications, brand management as well as RFP & proposal strategies and design
- Member of the Association of Proposal Management Professionals and Society of Technical Writers

# Agenda

1. Introduction and Roles
2. Rules of Engagement
3. Overview
4. ABCs of Proposals
5. RFP Elements
6. RFP Rules and Administration
7. The Requirements
8. Mandatory
9. Rated Non-Financial
10. Rated Financial
11. Pricing Elements
12. Rate Form
13. Submission Requirements
14. The Contract
15. Conclusion

# Guidelines for Discussion

- I can provide my opinion and when I do, I will say that it is 'in my opinion'. Nothing I say in this forum interprets anything for the purpose of the RFP or your own bid
- There can be no discussion of specific elements that affect competition between proponents

# A Competitive Process

“By responding to the RFP, the Proponent warrants that the prices and terms offered in the RFP have been developed solely by the Proponent, without sharing with any other Proponents responding to this RFP” (s2.39 W-D & s2.35 York)

**Share your questions.**

**Do not share your answers.**

# Requests for Proposal

- RFPs are a formal procurement tool
- Proposals are a formal sales tool
- Few marketplaces are uniform. A single size supplier does not fit all buyers. This is true of student transportation in Ontario.
- The RFP process favours the prepared

# RFP Workshop

This workshop is focused on helping all operators:

- Be more prepared to respond to the RFPs
- Review common elements in the RFPs
- Review relevant differences between the RFPs
- Unravel any complexities in the RFPs

Everything can be sold.  
Not everyone can sell.

# Service Objectives from the RFPs

“Accessible transportation”

“Safe, efficient and reliable”

“Delivers students to school safely, on time and ready to learn”

“Exceptional service to all stakeholders”

“Transportation services that are second to none”

# Service Objectives from the RFPs

## Wellington-Dufferin

5 year contract

Possible 3 one year extensions

(notice by Dec 1 2013)

~Sept 1 to June 30 each year

## York

5 year contract

Possible one year extension

(notice by Dec 1 2014)

Aug 1 to June 30 each year

# Competitive Restrictions

Wellington-Dufferin  
(s. 2.5)

No more than 50% of routes in any single service area to any bidder

No more than 25% of all routes to any one bidder

York  
(s.1.2 & s.2.5)

No more than 50% of either 72 or 20 passenger classes

No more than 50% of all vehicles

# Make it Easy for Reviewers

- Always Be Clear
- Always Be Complete
- Always Be Concise
- Show A, then B, then C
- Its All aBout the Criteria

# Make it Easy for You

- Always Be Closing - You are Selling
- Do A, then B, then C
- Ask – Be Certain
- Always Be Careful


# The Elements of the RFP

- RFP Rules and Administration
- The Requirements
  - Mandatory
  - Rated Non-Financial
  - Rated Financial and Pricing Instructions
- Submission Requirements
- The Contract
- Appendices, if any

# Rules and Administration (s2)

- Instructions and Definitions matter!
- Use and pay attention to language very carefully
- Read everything carefully
- Do not hesitate to ask for clarification
- Only what is in writing is important
- Do not assume. There will no exceptions

# Key Dates and Times

	Wellington – Dufferin	York
Pre-bid meeting	Nov 26 10:00 am	Nov 23 9:00 am
Deadline for questions	Dec 8 12:00 noon	Dec 2 4:00 pm
Final addenda issued by the Consortium	Dec 11 12:00 noon	Dec 3 12:00 noon
Submission deadline 	Dec 22 2:00 pm	Dec 10 4:00 pm
Interview dates (if required)	?	Jan 6 – 8 2010 ?
Award date	?	Jan 15 2010
Debriefing dates	?	Jan 21-22 2010

There questions and answers are critical both in responding to the requirements and learning about your competition.



# Communication



- Only communicate in writing through designated RFP Authority (s2.8 W-D, s2.9 York)

Wellington  
- Dufferin:

Lydia Halyk  
[lidia.halyk@ugdsb.on.ca](mailto:lidia.halyk@ugdsb.on.ca)

York:

Kathryn Smallwood  
[kathryn.smallwood@yrdsb.edu.on.ca](mailto:kathryn.smallwood@yrdsb.edu.on.ca)

# RFP Documents

- Only those documents detailed as part of the RFP are relevant. Each region is slightly different in its presentation of RFP documents.
- All the RFP documents have elements that can affect competitiveness, costs, or how the relationship between Consortia and suppliers will function.
- Addenda matter! 

## Contract Award (s2.4 W-D, s2.5 York)

- You will be assessed on **ONLY** those materials you formally present
- May or may not be an interview
- The agreement **AS IT IS WRITTEN IN THE RFP PACKAGE IS THE CONTRACT YOU WILL SIGN** if you are awarded a contract and you accept it

# Proponent (s2.6 W-D, s2.6 York)

- Wellington-Dufferin appears to require all proponents to be corporations or partnerships
- York appears not to require this
- The signatory of the proposal must have full and legal authority to bind the proponent's company

# Submission Deadline and Process

(s2.10-16 W-D, s2.11 - 20 York)

- Not a second late. Your watch doesn't matter. Bring your own receipt to be date-stamped.
- TWO envelope submission process
- No email or fax submissions
- Signatures are required
- No Influence, Agreement to Abide by Process
- Conflict of interest
- Proposal is binding unless withdrawn prior to closing

# Proponent's Abilities , Submission Completeness, Consortium Rights

- “Systematically describe Proponent’s abilities . . . .”
- “Proponents are required to, point by point, respond to each of the requirements . . . .”
- “no assumptions will be made”
- “reject proposal which . . . is incomplete, obscure, irregular or has erasures or corrections or . . . omits”

## Privacy (s2.30 – 31 W-D, s2.28 York)

- Proposals become the property of the Consortium
- Mark information deemed to be confidential clearly
- Understand the limitations of that provision
- Understand how PIPEDA, MFIPPA and the Confidentiality section (s2.37 W-D) apply to you

# Requirements of the Proposal (s3)

- Mandatory Requirements
- Rated Non-Financial Requirements
- Rated Financial Requirements
- Pricing Elements & Instructions

## Mandatory Requirements (s3.1)

- Form of Offer
- Rate Form
- Adherence to the Procedural Rules
- Declarations and Certifications
- Ability to Meet Insurance Requirements
- Financial Standing
- Tax Compliance (W-D)
- Addenda (s2.6 W-D & s2.7 York)

# Rated Non-Financial Requirements (s3.2)

Wellington - Dufferin		100
Student Safety Programs	+5	15
Driver Education/Training		15
Driver Retention Strategy		10
Customer Service	-5	10
Fleet Maintenance & Mgmt		10
Garage & Operating Facilities	+5	15
Admin/Ops Team & Facilities	-10	10
Operational/Contract Performance		10
Accident Procedures		5

York		120
Driver Education/Training		10
Driver Retention Strategy		10
Communication Strategy		10
Vehicle Maintenance & Mgmt & Cold Weather Programs		15
Fleet Age		10
Office, Garage & Operating Facilities		15
Admin/Ops Team & Facilities		15
Value Added Ideas, Innovation & Technology		10
Accident Procedures		10
References		5
Compliance		5
Financial Standing		5

**Sell what you will do for them**

**Use your past performance & examples to  
show why they should believe this**

**Do not assume that they already know**

# Superior Responses

- Highly comprehensive (It covers everything)
- Excellent (It is concise. Easy to read & understand.)
- Proactively give more, do more, provide more value
- The value is clearly visible to the reader (measureable)
  
- It is better than the other responses.
- This becomes a good, better and best analysis.

# Make it easy to score you well

## COMPREHENSIVE

- Answer ALL of the exact questions ASKED
- and THEN add more. (\* It does have to matter!)
- Use their language (show that you are using it)

# Make it easy to score you well

## EXCELLENT

- Answer ALL of the exact questions ASKED and add more
- Use their language (show that you are using it)
- Respond in clear & concise answers that:
  - stay on point
  - get to the point
  - prove the point

# Make it easy to score you well



Proactively provide more, do more

- Make sure you sell all that you provide
- Show it and demonstrate how it provides more value
- Go beyond the stated requirements
- Get inside the question in real life terms.
- This is where you distinguish yourself from competitors. Imagine their strengths. Match them or better yet, go beyond them.



# Make it easy to score you well

Provide evidence that proves what you state

- Copies of program manuals (training, etc)
- Pictures or layouts of facilities
- Facts and figures  (Not the place to talk \$)
- And any other demonstrables that prove what you are saying
- Reference proof and put it into an Appendix  
 (ask York about page limits and how/if you can use appendices)

# Bring Yourself to the Table

Imagine your competitors' response

- Why are you different, unique, special?
- What extra value do you and can you bring that is better than others, or better than most?
- Do this for each requirement

# Read the Need

## Get behind their words

- Why is this requirement important to them?
- Put yourself in their shoes
- Imagine their strategies to get what they want
- Remember that **THEY** are people

# Connect the Dots

Make the connections between what you say and what they need

- Tell them how what YOU DO matters to them
- How does it deliver their service objectives?
  - Accessible transportation”
  - “Safe, efficient and reliable”
  - “Delivers students to school safely, on time and ready to learn”
  - “Exceptional service to all stakeholders”
  - “Transportation services that are second to none”

# Stay Read-able

Make it EASY for the reviewers

- Short sentences
- Point form is easy to read for lists
- Simple language
- Executive Summary by Section or Journalist Style
- Use White Space

# Read What You Write

## Get fresh eyes

- Proof read
- Get someone else's opinion on what you wrote
- Read it out loud
- Leave time to review and edit

## Innovation & Value Added

- Two Types: Financial and Non-Financial
- Financial (Discounts, rebates, etc.) must only be in the Financial Bid envelope. Label them clearly
- Detail Non-Financial Value Adds/Innovations WITHOUT reference to dollars saved

# Provide References

- Supply name, organization, title, address, phone number and email address
- Vet your references first
- Ask permission
- Know what they will say

# Rated Financial Requirements Score

- York uses a ranked scoring system
- Wellington-Dufferin is using a 'scaled calculation' ?

## The Base Rate (s1.3 of the Agreement)

- Amortized cost of vehicles, other needed equipment & licensing
- Cost of training, spare drivers, insurance, maintenance (vehicle and cleaning requirements), parking/maintenance facilities, administration, profit
- Cost of fuel

## Rates in the RFPs (s1.3)

Description	Wellington - Dufferin	York
Mid- Day Rate	Not used	50%
Route Doubling	"generally not approved"	"prohibited"
Variable Rate	Undefined, but for extra costs	Not used
Time Rate	15 minute increments	Not used
Overtime Rate	Not used	15 minute increments
Total Daily Rate	Base Rate plus Variable rate	Base Rate plus Overtime rate

# Fuel Adjustments (s12.3 W-D, s11.2 York)

Wellington - Dufferin:

Total Route Distance (Ministry kms) **TIMES** Fuel Efficiency Rate **TIMES** Difference in Fuel Rate

Example given: 1800 kms, 3.61 km/litre, \$0.06  
 $1800 \text{ km} / 3.61 \times .06 = \$29.92$


York:

Total Routed Distance **DIVIDED BY** Fuel Efficiency Rate **TIMES** the Difference in Fuel Rate

Example not provided

# Fuel Rates in the RFPs (s1 2.2-3 W-D, s1 1.2 York)

Description	Wellington - Dufferin	York
Fuel Rate	\$0.90/litre for gas \$0.95 for diesel	\$0.92/litre
Vehicle Efficiency	3.61 km/litre (full & mid size buses), 4.65 km/litre (minibus/wheel chair bus), 7.71 km/litre (minivans/cars)	5.60km/l for 20 passenger & 3.56 km/l for 72 passenger)
Deviation required for Fuel Adjustment	\$0.05/litre	\$0.02/litre

Description	Wellington - Dufferin	York
<p>Consent to Disclosure s5.11, s4.10 York</p>	<p>Required by Operator for each driver</p>	<p>No clear language on providing Consent to Disclosure</p> 
<p>Hire Bilingual Drivers s10.3</p>	<p>"make every possible effort" for routes that service French and English language schools</p>	<p>Section NOT included</p>

## Other Costs

- Vehicle Age and Class (s.9.3 WD, 8.3 York)
- Phones, computer system and email required
- Vehicle communications
- M of T Annual Inspection Certificate (s.9.7/8.7 York)
- Driver's Daily Log Books, Hours of Service regulations
- Training (s5.2 Drivers to be aware of, and follow conditions of the Agreement)

## Routing in the RFPs

- Route Time and Distance per schedules
- Operator NOT responsible for routing (s3.1)
  - “The Consortium shall determine and designate route design, locations and times for pick up and discharge of students, destinations, student loads, student stop lists, student information and any information required by the Operator to perform the duties of the Contract.”
- No changes in routing and schedules by operator (s8.2 / s7.2 York)

# Contingency Planning

- Inclement weather
- Board labour dispute
- Operator labour dispute (s2.6 – 15 days to resolve or contract can be cancelled)

# REQUIREMENTS: PRICING ELEMENTS (s1.3)

Description	Wellington - Dufferin	York
Board labour dispute s2.7/s.2.6	1st 10 days (80%), next 20 days (60%), over 30 days (40%) of base rate. Subject to change to match ministry funding	1st 15 days (65%), after 15 days (50%) of base rate.  Fixed.
Safety Program s.4 WD Appendices	Section included	Section NOT included

Description	Wellington - Dufferin	York
Safety Program s.4 & Appendices	Section included	Section NOT included
Schedule A	First Aid	Safety
Schedule B	Safety	Routes
Schedule C	Applicable Acts	Standards of Performance
Schedule D	Performance Requirements	Pricing
Schedule E	Route Schedules	Section NOT included

# Pricing Elements (s2.1 Term)

Description	Wellington - Dufferin	York
Start Date	1-Sep-09	1-Aug-09
Contract Year	10 months	12 months
Days in Year (s8.2/s7.2)	188	188
Inclement Weather Rate	80%	65%
Inclement Weather cancellation (s2.5)	Notice required by 6:30 am	"Whenever possible" notice by 6:00 am.

# Pricing Elements

Description	Wellington - Dufferin	York
Trial Runs Required s8.9 (s7.8 York)	Not Billable	Billable not specified
Vehicle Communications s9.6 (s8.6 York)	Not detailed	Ratio of dispatchers to drivers to maintain "professional service"
Spare Vehicles s9.12 (s8.12 York)	10%	Sufficient for "professional service" - up to Consortium

# Getting to the Price

- Dollar bid is comprised of two parts
  - Base Rate - all costs in
  - Overtime or Variable Rate – operating costs for 15 minutes
- Detailed by run and by year

# Rate Form – York RFP

Area	Municipality	Base Rate	Overtime Rate
1	Aurora		
2	East Gwillimbury		
3	Georgina		
4	King		
5	Markham A		
6	Markham B		
7	Newmarket		
8	Richmond Hill		
9	Vaughan A		
10	Vaughan B		
11	Whitchurch Stouffville		

# Rate Form – York RFP

72-Passenger Bid Form												
Area Number	Name of Area	Number of Routes	2010-2011		2011-2012		2012-2013		2013-2014		2014-2015	
			Base Rate	Overtime Rate	Base Rate	Overtime Rate	Base Rate	Overtime Rate	Base Rate	Overtime Rate	Base Rate	Overtime Rate
1	Aurora	51										
2	East Gwillimbury	17										
3	Georgina	53										
4	King	32										
5	Area bound by 19 <sup>th</sup> Sideroad to the North, York/Durham Townline to the East, Steeles Avenue to the South and McCowan Road to the West in the Town of Markham	46										

# Rate Form Wellington Dufferin

Year	Base Rate Per Day – 72 passenger bus Refer to Article 5.2 – Pricing Instructions Fuel to be included in Base Rate	Time Rate (in 15 Min increments)
2009/10		
2011/12		
2012/13		
2013/14		
2014/15		

**Available 72 Passenger Bus Routes: 22**

Average KM per Route: 99.9

Average Time per route: 114 minutes

Number of Routes proponent wishes to bid on in the South Wellington: \_\_\_\_\_

# Rate Form –Wellington Dufferin

Year	Base Rate Per Day – 72 passenger bus Refer to Article 5.2 – Pricing Instructions Fuel to be included in Base Rate	Time Rate (in 15 Min increments)
2009/10		
2011/12	<b>All Cost Factors including Fuel</b>	<b>Operating Cost Factors for 15 minutes of time – distance is undetermined</b>
2012/13		
2013/14		
2014/15		

**Available 72 Passenger Bus Routes: 22**

Average KM per Route: 99.9

Average Time per route: 114 minutes

Number of Routes proponent wishes to bid on in the South Wellington: \_\_\_\_\_

# Rate Form – Wellington Dufferin

## ADDITIONAL TRANSPORTATION RATES

Type of Additional Work	2009/10	2010/11	2011/12	2012/13	2013/14
<b>Driver's Additional Hourly Rate</b> (hourly rate includes benefits)					
<b>Route Monitor/Aide Hourly Rate</b> (hourly rate includes benefits)					
<b>First Rider Program</b> (per presentation)					
<b>Bus Evacuation Training</b> (per presentation)					
<b>Emergency Transportation</b>					
Vehicle Hourly Rate					
Kilometer Rate					
Driver Hourly Rate (with Benefits)					
<b>Late &amp; Noon Transportation</b>					
Vehicle Hourly Rate					
Kilometer Rate					
Driver Hourly Rate (with Benefits)					

# Completing the Rate Forms

- Complete all the forms!
- Enter NONE or NO BID into every blank space even if you are not bidding on a route
- This is part of your financial bid and goes into the Financial Bid envelope

# Proposal Submission Format (s5/s4 York)

- Table of Contents
- Executive Summary
- Introduction to your company, your business and your experience
- **TAB AND LABEL EVERYTHING !**

## Envelope 1: Technical Response Set Contents

- All components of Mandatory Requirements (section 3.1) fully, legibly and correctly completed.
- Complete and legible responses for each item of the Rated Non-Financial Requirements (section 3.2)
- All Supporting Documentation

## Envelope 2: Financial Component York (s4.3)

- Sealed envelope
- Five (5) printed hard copies of the FULLY COMPLETED rate bid form
- Two electronic copy of the SAME FULLY COMPLETED rate bid form on Two USB memory sticks. Electronic copy must be in Excel 2003 format.

### ADDITIONAL ELEMENTS (OPTIONAL)

- 5 printed hard copies and one electronic copy of other financial incentives, discounts or other financial value adds you are presenting, if any. Include your discounts on your USB memory stick if any.

## Envelope 2: Wellington Dufferin (s5)

- Sealed envelope
- Five hard copies of Appendix D – Form of Offer  
FULLY COMPLETED

### ADDITIONAL ELEMENTS (OPTIONAL)

- Five printed hard copy of other financial incentives, discounts or other financial value adds you are presenting, if any.

# Signing the Contract

- The Contract will be signed as is, no changes
- The Contract has elements that have financial and operational impact
- The Contract is the primary 'rulebook' for your relationship with the Consortia

# Contract – Audits

Description	Wellington - Dufferin	York
Audit (5.9)	Section included. Audit language also included in 15.8 (Right to Audit)	Section NOT included
Right to Audit 15.8 (14.8 York)	See Section 5.9	Only one section in York

# Contract – Changes

Description	Wellington - Dufferin	York
s2.4 (a) i. Notice - route cancellation	15 days in writing	10 days in writing
s2.4 ii. Notice route modification	3 days in writing	0 days (will TRY to give 72 hours notice)

- Dispute Resolution Mechanism s15.6 – 7 / s14.6 – 7 York
- Termination – s2.3
- Performance Standards - Appendix

