

SECTION 4.0

PROPOSAL REQUIREMENTS

4.1 FORMAT AND INSTRUCTIONS

Proposal Innovation, Structure, Clarity and Brevity will be assessed throughout the Proposal Response and points will be awarded accordingly. Proposals should be written in clear, concise language that allows for ease of retrieval and understanding by the evaluation team / committee.

The Proposal should be written in Arial 11, on 8.5" x 11" margins of 2.5 cm and bound using a method that allows the document to lay flat when open such as coil bound or 3-ring binder. The proposal content and structure should include a formal letter of introduction, a table of contents and should be written in the same order, format, numbering and titles as illustrated in this section and RFP.

The following consists of questions that are to be addressed in the order provided within your proposal. Your proposal should clearly cross-reference to the corresponding question. If a Proponent wishes to include additional information that is not requested, such information is to be cross referenced and contained within a separate Appendix.

4.2 GENERAL

Proponents shall provide a corporate profile of the firm outlining its history and philosophy.

Proponents shall provide the name, qualifications and experience of the project leader and all field personnel. The project leader shall maintain oversight for quality assurance purposes.

4.3 COMPANY BACKGROUND

- (a) Legal name of the organization and current operating business name if different from the legal name.
- (b) Street & mailing address of head office and local office if different.
- (c) Name, title, phone, fax and email address of primary contact person and an alternate if primary contact not available.
- (d) What percentage of your company's existing business would TRU's business opportunity represent?
- (e) Provide and describe any past, pending or threatened civil, governmental proceeding/investigations or legal proceedings within the past 5 years which the company or its directors or officers is or was party to.
- (f) Describe your organization's Advanced Education experience and if you have equivalent experience, describe why you believe it to be equivalent?

4.4 FINANCIAL AND BUSINESS PROFILE

The Proponent must have a sound financial and business profile and must have the resources to successfully undertake and complete the Project Management Services.

The Proponent shall:

- (a) Provide information regarding the Proponent's financial institution, insurance company, policy details and limits;
- (b) Provide details of any claims/lawsuits against the Proponent that may materially impact on the Proponent's ability to perform the Services; and
- (c) Provide additional information as may materially affect the Proponent's ability to perform the Services.

4.5 EXPERIENCE

- Describe experience with sustainability-related dashboards and data management software in large complex organizations tracking numerous key performance indicators.
- Describe your organization's Advanced Education experience and if you have equivalent experience, describe why you believe it to be equivalent?
- List post-secondary educational institutions currently using the same solution being proposed. Include contact information and year installed.
- Describe experience with the Sustainability Tracking Assessment and Rating System (STARS)
- Describe the history of the proposed software solution. Include the year the product was released and the version release history.
- What third parties (if any) is your company dependent upon to deliver your offering (software, implementation, hosting etc.?)

4.6 APPROACH

The Proposal must describe the Proponent's approach to meeting the requirements described in the Project Scope.

TRU reserves the right to request short listed proponents to provide a presentation of the proposed solution. The purpose of the presentation will be to verify information contained in the proposals and to address any questions TRU may have with respect to the proposed software solution. Further information regarding the presentation will be issued to short listed proponents.

Following the presentation, TRU may review and adjust the Proponents scores for the rated evaluation criteria.

All associated costs for any presentation of the proposed solution will be the responsibility of the Proponent. Arrangements made by made to conduct the presentation remotely.

4.7 PERSONNEL

Describe the depth of project management resources within your company and your ability to back-up and support your project management resources.

Describe the structure of the account team that will support TRU.

4.8 SCHEDULE

The Proposal must include an outline of the Proponent's ability to begin the project at the intended start date.

TRU intends to begin implementation of the Environmental Sustainability Dashboard Solution as early as possible with implementation to be substantially started or completed by November 30 2015. Responses must include a timeline for the implementation process, including tasks that must be accomplished by TRU and a timeline for training.

Present a proposed schedule of work for the project with timelines outlined. Describe the installation and training process and provide a timeline for installation indicating required steps and time to completion.

4.9 VALUE ADDS

Illustrate any alternate and/or value added solutions that would benefit TRU in terms of cost savings, improved service, quality control, sustainable initiatives, student employment, scholarships, bursaries, etc. Please ensure that any of the value adds which you may propose are identified separately.

4.10 COMPLIANCE WITH THE RFP TERMS AND CONDITIONS

Please indicate your compliance to the Terms and Conditions outlined within this RFP (see **Appendix F**).

4.11 REFERENCES

Please provide as well the names and contact information of three references where similar services in the university sector have been provided by your organization.

Please provide f three references where similar services have been provided by your organization. It would be preferable if at least two (2) references are within Canada.

List names of other post-secondary educational institutions currently using the same solution being proposed. Include contact information and year installed.

References must include contact name, address, telephone number and summary of products, functions and services delivered in use for each reference. Ensure that all information provided is current contact information.

4.12 FINANCIAL / FEES

- (a) The Proposal must identify all-inclusive (except disbursements) hourly rates for each individual proposed for the services. The Proposal must also identify a total fee estimate and disbursement estimate for the duration of the Project (see **Appendix C**).

Prices quoted are to be:

- In Canadian dollars; and
- Exclusive of applicable tax.

- (b) TRU supports a performance based model that ensures target outcomes and accountability. Please indicate how your Company supports this model and how it will address the following:
 - (i) Penalties for non-performance;
 - (ii) Guarantees for schedules and deliverables;
 - (iii) TRU favors relationships that are open and transparent. Describe the process you would use to support this principle;
 - (iv) TRU's standard payment terms are net thirty (30) days from receipt of invoice. Please describe your firm's typical payment terms.

4.13 FULL DISCLOSURES

The Proponents must provide a statement providing full and complete disclosure of:

- (a) Any personal relationship to any employee of the Thompson Rivers University and/or the evaluation team or team members; and
- (b) Any business relationship with the Thompson Rivers University and/or this Project.

(See **Appendix B**)

4.14 ENVIRONMENTAL SUSTAINABILITY

Thompson Rivers University recognizes that it has a significant role to play in education, research, policy development and information exchange related to the health of the local and global environments in which citizens live and work. TRU seeks to be the University of Choice for students concerned about environmental sustainability and to be recognized for its leadership and stewardship in responding to environmental challenges. TRU seeks to partner with contractors who support in constructive ways the environment. Please identify areas your company are making a difference and how that can impact TRU positively.