



**Request for Supplier Qualifications**

**For**

**Communications and Marketing Professional Services**

**Request for Supplier Qualifications No: RFSQ-2023-F315**

**Issued: March 31, 2023**

**Submission Deadline: April 26, 2023 at 2:00pm (local time)**

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## PART 1 – INTRODUCTION

### PART 1 – INVITATION AND SUBMISSION INSTRUCTIONS

#### 1.1 RFSQ Timeline

Issue Date of RFSQ	March 31, 2023
Deadline for Questions	April 17, 2023
Deadline for Issuing Addenda	April 19, 2023
Submission Deadline	April 26, 2023, 2:00 PM (local time)
Rectification Period	Two (2) business days
Contract Negotiation Period	May 15 to May 26, 2023
Anticipated Execution of Agreement	End of May 2023

The RFSQ timeline is tentative only and may be changed by the University at any time. For greater clarity, business days means all days that the University is open for business.

#### 1.2 Invitation to Respondents

This Request for Supplier Qualification (RFSQ) is an invitation by the University of Guelph (University) to prospective Respondents to submit proposals for the creation of a Qualified Supplier List, as further described in Section A of Appendix A – RFSQ Particulars.

#### 1.3 About The University

Over the decades, the University has expanded, and its comprehensive nature has evolved. The legacy of our founding colleges has provided a bedrock for our pursuit of excellence across disciplines. We have built a caring and supportive community environment that allows people to thrive and excel in a wide range of scholarly pursuits.

Today, our footprint includes University of Guelph-Humber, Ridgetown, and research stations across Ontario – a network that preserves and enhances the University’s connections across rural and urban settings. The University’s seven colleges span the arts, social and applied human sciences, engineering and physical science, biological science, business and economics, agriculture, and veterinary medicine. Together, our colleges and campuses provide a comprehensive academic foundation, with proven excellence, deep connections to communities and partners, and the capacity to tackle many of the big questions framing the future of our world.

U of G has nearly 30,000 undergraduate and graduate students at our campuses in Guelph, Toronto and Ridgetown, including 1,700 international students from more than 120 countries. More than 150 years after the launch of our founding colleges, and more than 50 years since the establishment of the University of Guelph, we now have more than 179,000 alumni living around the globe.

Our living and learning environments encourage exploration and the interdisciplinary sharing of new ideas, critical for meeting challenges posed by our more complex and interconnected world. Our faculty and researchers provide students with ground-breaking research opportunities, in laboratories, art studios, libraries and in the field. Student engagement is fundamental to learning and research at U of G. By focusing on the “whole student,” we give University of Guelph graduates the tools and skills to make a difference in our ever-changing world.

At Guelph, we turn knowledge into action. We are deeply committed to research excellence and are known to create and mobilize knowledge locally, nationally and around the world. Our research strengths range from agri-food and the bio-economy to animal and human health to the arts and social sciences and emphasize innovation and real-world impact. We promote established research strengths while exploring new scholarly opportunities, ensuring that our knowledge and discoveries shape understanding and improve life.

For information related to the University of Guelph, please visit the University's website [www.uoguelph.ca](http://www.uoguelph.ca).

#### **1.4 RFSQ Contact**

To contact the University in relation to this RFSQ, Respondents must register with the University's [public purchasing portal](#) and initiate the communication electronically through the Vendor Messaging function. The University will not accept communications by any other means, except as specifically stated in this RFSQ.

For the purposes of this procurement process, the "RFSQ Contact" will be:

Rajna Marilovic  
Strategic Sourcing Specialist  
[rmarilov@uoguelph.ca](mailto:rmarilov@uoguelph.ca)

Respondents and their representatives are not permitted to contact any employees, officers, agents, elected or appointed officials, consultants or other representatives of the University, other than the RFSQ Contact, concerning matters regarding this RFSQ. Failure to adhere to this rule may result in the disqualification of the Respondent and the rejection of the Respondent's proposal.

#### **1.5 Master Agreement**

Awarded Respondents will be requested to enter into a Master Agreement with the University for the provision of the deliverables, which governs the potential subsequent provision of the deliverables under an invitational second stage process. The terms and conditions found in Appendix D - Form of Agreement are to form the basis for commencing negotiations. Respondents should review this contract carefully. Any terms and conditions which may need to be negotiated should be highlighted and a marked up copy of the contract submitted with the response.

##### **1.5.1 Master Agreement Term**

The term of the Master Agreement will be for a period of three (3) years, with an option in favour of the University to extend for an additional two (2) years. Once per year during the term of the contract, Suppliers have the opportunity to submit all requested information contained in this RFSQ to be considered for addition to the VOR list if they are not successful in the first award. Submissions will be scored using the same criteria, and will be notified as to the status of their submission.

#### **1.6 Submission of Responses**

##### **1.6.1 Responses to be Submitted at the Prescribed Location**

All requested documents must be submitted to the opportunity Ref. RFSQ-2023-F315 on the Bonfire portal <https://uoguelph.bonfirehub.ca/portal/?tab=openOpportunities>.

Submissions by other methods will not be accepted.

Minimum system requirements are Internet Explorer 8/9/10+, Google Chrome, or Mozilla Firefox. Javascript must be enabled.

Respondents should contact Bonfire at [Support@GoBonfire.com](mailto:Support@GoBonfire.com) for technical questions related to submissions or visit Bonfire's help forum at <https://bonfirehub.zendesk.com/hc>.

##### **1.6.2 Responses to be Submitted on Time**

Responses must be uploaded and finalized on or before the Submission Deadline set out in the RFSQ Timetable. Uploading large documents may take significant time, depending on file size and internet connection speed. It is strongly recommended that Respondents allow sufficient time of at least one (1) hour before the Submission Deadline to upload documents and finalize their

submissions. Respondents will receive an email confirmation receipt with a unique confirmation number upon finalizing their submissions.

### **1.6.3 Responses to be Submitted in Prescribed Manner**

Submission materials should be prepared in the file formats listed under Requested Information for this opportunity in the Bonfire portal.

The maximum upload file size is 1000 MB.

Documents should not be embedded within uploaded files, as the embedded files will not be accessible or evaluated.

### **1.6.4 Amendment of Responses**

Respondents may amend their responses prior to the Submission Deadline by un-submitting the response and re-submitting a revised response through the Bonfire portal.

### **1.6.5 Withdrawal of Responses**

At any time throughout the RFSQ process, a Respondent may withdraw a submitted response. To withdraw a response prior to the Submission Deadline, a Respondent should un-submit the response through the Bonfire portal. Following the Submission Deadline, a notice of withdrawal must be sent to the RFSQ Contact and must be signed by an authorized representative of the Respondent.

## PART 2 – EVALUATION AND SELECTION

### 2.1 Stages of Evaluation

The University will conduct the evaluation of responses in the following stages:

### 2.2 Stage 1 – Mandatory Submission Requirements

Stage 1 will consist of a review to determine which responses comply with all of the mandatory submission requirements. If a response fails to satisfy all of the mandatory submission requirements, the University will issue the Respondent a rectification notice identifying the deficiencies and providing the Respondent an opportunity to rectify the deficiencies. The only rectifications that will be considered valid will be those submitted in answer to a rectification request from the University. If the Respondent fails to satisfy the mandatory submission requirements within the Rectification Period, its response will be rejected. The Rectification Period will begin to run from the date and time that the University issues a rectification notice to the Respondent. The mandatory submission requirements are set out in Section C of Appendix A – RFSQ Particulars.

### 2.3 Stage 2 – Evaluation of Common Rated Criteria

Stage 2 will consist of the following two sub-stages:

#### 2.3.1 Rated Criteria

The University will evaluate each qualified response on the basis of the rated criteria as set out in Section F of Appendix A – RFSQ Particulars.

### 2.4 Stage 3 – Pricing

Stage 3 will consist of a scoring of the submitted pricing in accordance with the price evaluation method set out in Appendix C - Pricing. The evaluation of price will be undertaken after the evaluation of mandatory requirements and rated criteria has been completed.

### 2.5 Ranking and Selection

The University intends to award to a minimum of the top two (2) ranked Respondents in each criteria group.

### 2.6 Notification of Top-Ranked Respondents

The top-ranked Respondents will enter into a Master Agreement in accordance with the process set out in the Evaluation of Responses. Each selected Respondent will be expected to satisfy the pre-conditions of award listed in Section E of Appendix A – RFSQ Particulars and to enter into the Master Agreement within the timeframe specified in the selection notice. Failure to do so may result in the disqualification of the Respondent and the selection of another Respondent.

### 2.7 Second-Stage Competitive Process

Respondents selected as Qualified Suppliers will be invited to a second stage competitive process when the need arises for services as outlined.

When a need for services in the categories described is identified, a direct award or invitational second stage process will be conducted among the Qualified Suppliers only.

The estimated procurement total will be used to determine the minimum number of Qualified Suppliers that will be invited to participate, as outlined in the charts below. The University may invite more than the minimum number of Suppliers for any of the categories listed.

The choice of Suppliers to be invited will be based on a range of criteria such as fit, complexity, area of expertise, and capacity. Best efforts will be made to ensure all of the Qualified Suppliers are invited to participate in a second stage selection process during the term of the contract. There is no guarantee of the volume or value of work that will be required.

Each engagement will be initiated on an as needed basis. The University will supply the appropriate documentation and ask for a list of candidates.

Based on the type of work being requested this may include one or more of the following:

- Statement of Work (SOW)
- Project Brief
- Request for Services
- Work Assignment

In response, the Qualified Supplier should provide the details of the individual[s] available for the work along with their resumes and an all-inclusive hourly labour rate in Canadian funds.

### 2.7.1 Second Stage Tiers

Qualified Suppliers will be invited based on the values listed.

<b>Procurement Value</b>	<b>Min # of Invited Suppliers</b>
Less than \$150,000	1
\$150,001 to \$250,000	2
\$250,001 and over	3

## **PART 3 – TERMS AND CONDITIONS OF THE RFSQ PROCESS**

### **3.1 General Information and Instructions**

#### **3.1.1 Respondents to Follow Instructions**

Respondents should structure their responses in accordance with the instructions in this RFSQ. Where information is requested in this RFSQ, any response made in a response should reference the applicable section numbers of this RFSQ.

#### **3.1.2 Responses in English**

All responses are to be in English only.

#### **3.1.3 No Incorporation by Reference**

The entire content of the Respondent's response should be submitted in a fixed form, and the content of websites or other external documents referred to in the Respondent's response but not attached will not be considered to form part of its response.

#### **3.1.4 Past Performance**

In the evaluation process, the University may consider the Respondent's past performance or conduct on previous contracts with the University or other institutions.

#### **3.1.5 Information in RFSQ Only an Estimate**

The University and its advisers make no representation, warranty or guarantee as to the accuracy of the information contained in this RFSQ or issued by way of addenda. Any quantities shown or data contained in this RFSQ or provided by way of addenda are estimates only, and are for the sole purpose of indicating to Respondents the general scale and scope of the Deliverables. It is the Respondent's responsibility to obtain all the information necessary to prepare a response in response to this RFSQ.

#### **3.1.6 Respondents to Bear Their Own Costs**

The Respondent will bear all costs associated with or incurred in the preparation and presentation of its response, including, if applicable, costs incurred for interviews or demonstrations.

#### **3.1.7 Response to be Retained by the University**

The University will not return the response or any accompanying documentation submitted by a Respondent.

#### **3.1.8 No Guarantee of Volume of Work or Exclusivity of Contract**

This RFSQ process will not result in any commitment by the University to purchase any goods or services from any Respondent. While the University intends to conduct an invitational second-stage competitive process for the procurement of the Deliverables, it is under no obligation to do so and the University may choose not to proceed with a second-stage competitive process for the procurement of the Deliverables. The University makes no guarantee of the value or volume of Deliverables that may be required. Any agreement entered into pursuant to an invitational second-stage competitive process will not be an exclusive contract for the provision of the described Deliverables. The University may contract with others for goods and services the same as or similar to the Deliverables or may obtain such goods and services internally.

### **3.2 Communication after Issuance of RFSQ**

#### **3.2.1 Respondents to Review RFSQ**

Respondents should promptly examine all of the documents comprising this RFSQ, and may direct questions or seek additional information in writing through the University's Bonfire Portal Question and Answer function on or before the Deadline for Questions. No such communications are to be directed to anyone or by any other means than submission through the Bonfire Portal. The University is under no obligation to provide additional information, and the University is not responsible for any information provided by or obtained from any source other than the RFSQ



Contact or the University's Bonfire Portal. It is the responsibility of the Respondent to seek clarification through the University's Bonfire Portal on any matter it considers to be unclear. The University is not responsible for any misunderstanding on the part of the Respondent concerning this RFSQ or its process.

### **3.2.2 All New Information to Respondents by Way of Addenda**

This RFSQ may be amended only by addendum in accordance with this section. If the University, for any reason, determines that it is necessary to provide additional information relating to this RFSQ, such information will be communicated to all Respondents by addenda posted through the University's Bonfire Portal. Each addendum forms an integral part of this RFSQ and may contain important information, including significant changes to this RFSQ. Respondents are responsible for obtaining all addenda issued by the University through the University's Bonfire Portal Public Notice function.

### **3.2.3 Post-Deadline Addenda and Extension of Submission Deadline**

If the University determines that it is necessary to issue an addendum after the Deadline for Issuing Addenda, the University may extend the Submission Deadline for a reasonable period of time.

### **3.2.4 Verify, Clarify and Supplement**

When evaluating responses, the University may request further information from the Respondent or third parties in order to verify, clarify or supplement the information provided in the Respondent's response including but not limited to clarification with respect to whether a response meets the mandatory technical requirements set out in Section D of Appendix A - Deliverables. The University may revisit, re-evaluate and rescore the Respondent's response or ranking on the basis of any such information.

## **3.3 Notification and Debriefing**

### **3.3.1 Notification to Other Respondents**

Once the selected Respondents have been notified, the other Respondents may be notified directly in writing and will be notified by public posting in the same manner that this RFSQ was originally posted of the outcome of the RFSQ process.

### **3.3.2 Debriefing**

Respondents may request a debriefing after receipt of a notification of the outcome of the RFSQ process. All requests must be in writing to the RFSQ Contact and must be made within sixty (60) days of such notification.

### **3.3.3 Procurement Protest Procedure**

If a Respondent wishes to challenge the RFSQ process, it should provide written notice to the RFSQ Contact in accordance with the University's procurement protest procedures and any applicable trade agreement or other applicable bid protest procedures. A Procurement Protest Form must be completed and submitted to the University within sixty (60) days of notification of award.

## **3.4 Conflict of Interest and Prohibited Conduct**

### **3.4.1 Conflict of Interest**

For the purposes of this RFSQ, the term "Conflict of Interest" includes, but is not limited to, any situation or circumstance where:

- (a) in relation to the RFSQ process, the Respondent has an unfair advantage or engages in conduct, directly or indirectly, that may give it an unfair advantage, including but not limited to (i) having, or having access to, confidential information of the University in the preparation of its response that is not available to other Respondents; (ii) communicating with any person with a view to influencing preferred treatment in the RFSQ process (including but not limited to the lobbying of decision makers involved in the RFSQ process); or (iii) engaging in conduct that

compromises, or could be seen to compromise, the integrity of the open and competitive RFSQ process or render that process non-competitive or unfair; or

- (b) in relation to the performance of its contractual obligations under a contract for the Deliverables, the Respondent's other commitments, relationships or financial interests (i) could, or could be seen to, exercise an improper influence over the objective, unbiased and impartial exercise of its independent judgement, or (ii) could, or could be seen to, compromise, impair or be incompatible with the effective performance of its contractual obligations.

#### **3.4.2 Disqualification for Conflict of Interest**

The University may disqualify a Respondent for any conduct, situation or circumstances determined by the University, in its sole and absolute discretion, to constitute a Conflict of Interest as defined above.

#### **3.4.3 Disqualification for Prohibited Conduct**

The University may disqualify a Respondent or terminate any contract subsequently entered into if the University determines that the Respondent has engaged in any conduct prohibited by this RFSQ.

#### **3.4.4 Prohibited Respondent Communications**

Respondents must not engage in any communications that could constitute a Conflict of Interest and should take note of the Conflict of Interest declaration set out in the Appendix B - Submission Form.

#### **3.4.5 Communicate with Media**

Respondents must not at any time directly or indirectly communicate with the media in relation to this RFSQ or selection of Respondents pursuant to this RFSQ without first obtaining the written permission of the RFSQ Contact.

#### **3.4.6 Lobbying**

Respondents must not, in relation to this RFSQ or the evaluation and selection process, engage directly or indirectly in any form of political or other lobbying whatsoever to influence the selection of successful Respondent.

#### **3.4.7 Illegal or Unethical Conduct**

Respondents must not engage in any illegal business practices, including activities such as bid-rigging, price-fixing, bribery, fraud, coercion or collusion. Respondents must not engage in any unethical conduct, including lobbying (as described above) or other inappropriate communications; offering gifts to any employees, officers, agents, elected or appointed officials or other representatives of the University; deceitfulness; submitting responses containing misrepresentations or other misleading or inaccurate information; or any other conduct that compromises or may be seen to compromise the competitive process.

#### **3.4.8 Past Performance or Past Conduct**

The University may prohibit a supplier from participating in a procurement process based on past performance or based on inappropriate conduct in a prior procurement process, including but not limited to the following:

- (a) illegal or unethical conduct as described above;
- (b) the refusal of the supplier to honour submitted pricing or other commitments; or
- (c) any conduct, situation or circumstance determined by the University, in its sole and absolute discretion, to have constituted a Conflict of Interest.

### **3.5 Confidential Information**

#### **3.5.1 Confidential Information of the University**

All information provided by or obtained from the University in any form in connection with this RFSQ either before or after the issuance of this RFSQ

- (a) is the sole property of the University and must be treated as confidential;
- (b) is not to be used for any purpose other than replying to this RFSQ and the performance of any subsequent contract for the Deliverables;
- (c) must not be disclosed without prior written authorization from the RFSQ Contact; and
- (d) must be returned by the Respondents to the University immediately upon the request of the University.

### **3.5.2 Confidential Information of Respondent**

A Respondent should identify any information in its response or any accompanying documentation supplied in confidence for which confidentiality is to be maintained by the University. The confidentiality of such information will be maintained by the University, except as otherwise required by law or by order of a court or tribunal. Respondents are advised that their responses will, as necessary, be disclosed on a confidential basis, to the University's advisers retained to advise or assist with the RFSQ process, including the evaluation of responses. If a Respondent has any questions about the collection and use of personal information pursuant to this RFSQ, questions are to be submitted to the RFSQ Contact.

## **3.6 Procurement Process Non-Binding**

### **3.6.1 No Contract A and No Claims**

This procurement process is not intended to create and will not create a formal legally binding bidding process and will instead be governed by the law applicable to direct commercial negotiations. For greater certainty and without limitation:

- (a) this RFSQ will not give rise to any Contract A–based tendering law duties or any other legal obligations arising out of any process contract or collateral contract; and
- (b) neither the Respondent nor the University will have the right to make any claims (in contract, tort, or otherwise) against the other with respect to the selection of Respondents, a decision to reject a response or disqualify a Respondent, or a decision of the Respondent to withdraw its response.

### **3.6.2 No Legal Relationship or Obligation**

No legal relationship or obligation regarding the procurement of any good or service will be created between the Respondent and the University by this RFSQ process.

### **3.6.3 Cancellation**

The University may cancel or amend the RFSQ process without liability at any time.

### **3.6.4 Funding**

The University reserves the right to make partial award (if any) or multiple stages of award within the scope of the Agreement described in the RFSQ due to the consideration of the University's resources and funding available at the time of award. Any award made by the University to the successful Respondent (if any) shall be subject to the availability of funding at the time of award.

## **3.7 Governing Law and Interpretation**

The Terms and Conditions of RFSQ Process (Part 3)

- (a) are intended to be interpreted broadly and separately (with no particular provision intended to limit the scope of any other provision);
- (b) are non-exhaustive and will not be construed as intending to limit the pre-existing rights of the parties to engage in pre-contractual discussions in accordance with the common law governing direct commercial negotiations; and

(c) are to be governed by and construed in accordance with the laws of the province of Ontario and the federal laws of Canada applicable therein.

### **3.8 Canadian Trade Agreements**

The University is subject to the procurement obligations outlined in the following procurement chapters of the Canadian trade agreements:

Chapter 5 of the [Canadian Free Trade Agreement](#) (CFTA)

Chapter 19 of the [Canada-European Union Comprehensive Economic and Trade Agreement](#) (CETA)

Chapter 9 of the [Trade and Cooperation Agreement Between Ontario and Quebec](#) (OQTCA)

Respondents should note that procurements covered by the applicable trade agreements are subject to the procurement chapters but that the rights and obligations of the parties shall be governed by the specific terms of each particular RFSQ. For further details, please refer to the websites of these trade agreements.

### **3.9 Accessibility for Ontarians with Disabilities Act**

The University is committed to fostering, creating and maintaining an accessible environment for all individuals under the Accessibility for Ontarians with Disabilities Act (hereinafter referred to as the AODA).

All suppliers of the University who provide goods, services or facilities at, or on behalf of, the University and who will be working with the public (students, staff, faculty, visitors and other third parties) are required:

- (a) to ensure that training on the requirements of the Accessibility Standards are provided to those of its employees who will be working with the public (students, staff, faculty, visitors or other third parties) at or on behalf of the University and who participate in developing the Respondent's policies, practices or procedures;
- (b) to keep records of such training; and
- (c) to provide such records when required by the University.

The successful Respondent(s), where applicable, will be required upon notification of award to provide to the University with a signed AODA Accessibility Standard for Customer Service Training Compliance Form prior to commencing any work for the University.

The AODA Accessibility Standard for Customer Service Training Compliance Form is available at <https://www.uoquelfh.ca/finance/sites/uoquelfh.ca.finance/files/public/FF020.0503%20AODA%20Supplier%20Compliance%20Form%20FINAL-es.pdf>

### **3.10 Environmental Sustainability**

As an academic and research leader in areas that contribute to environmental sustainability, the University recognizes the importance of reducing the size of the University's ecological footprint and is committed to integrating environmentally responsible practices into our teaching, research, administration and operation.

All suppliers of the University are encouraged to provide their products/services in an environmentally responsible manner designed to (a) make efficient use of natural resources; (b) minimize waste; (c) minimize toxicity; (d) use renewable or recycled materials; (e) contain reusable parts or reusability; and/or (f) protect indoor and outdoor air quality.

In keeping with the University's effort to reduce ecological footprints, we use the [BonfireHub](#) portal for accepting and evaluating proposals digitally. For instructions on submitting proposals, please

refer to the section of Submission of Proposals in the RFSQ. For information on the Bonfire, please refer to <http://gobonfire.com/>.

[End of Part 3]

## APPENDIX A - DELIVERABLES

### A. THE DELIVERABLES

The University is creating a Qualified Supplier list to assist the External Relations (ER) department with communications and marketing projects on an as required basis. This will allow us to achieve the following:

- Receive high quality services in a timely manner.
- Obtain the best value and cost savings for services.
- Augment capabilities to meet backlogged requests and new request with aggressive deadlines.

The ER department consists of Alumni Affairs and Development, Communications and Public Affairs, and Government and Community Relations. Key responsibilities are:

- Leading the development of public and private philanthropic support.
- Overseeing University wide communications and public affairs.
- Providing oversight and direction in communications and marketing strategies.
- Building and maintaining positive relationships with key stakeholders, including government, the community and the public, to enhance connectivity and engagement.

For each new engagement request, Qualified Suppliers will be expected to:

- Respond to service request and provide confirmation of availability.
- Enter into a service agreement as required.
- Assign highly skilled, reliable resource(s) for the type and length of engagements based on the requirements as outlined in individual engagement proposal, until work completed and signed off.
- Any changes for engagement services will be done through properly documented Change Request orders process.

#### A.1 Service Categories

The Qualified Supplier list will be broken out into the following categories:

1. Crisis Management
2. Marketing Strategy and Planning
3. Stakeholder Engagement

Below is a detailed overview of the services under each category.

SERVICE CATEGORY	DESCRIPTION	KEY DELIVERABLES
<b>Crisis Management</b>	Broad and specific communications planning and advice for handling high-profile situations involving controversy, conflict or crisis in a University setting, including but not limited to; <ul style="list-style-type: none"> <li>• civil and criminal allegations against faculty and or/staff</li> <li>• student protests, movements or disruptions (especially those involving allegations of sexual or physical violence)</li> <li>• claims of harassment or discrimination.</li> </ul>	<ul style="list-style-type: none"> <li>• Assist in the development of a crisis communications plan/strategy, if warranted</li> <li>• Provide assistance/insight in the development of key messages and media communications</li> <li>• Provide insight during a crisis or conflict</li> </ul>
<b>Marketing Strategy and Planning</b>	Includes but is not limited to: <ul style="list-style-type: none"> <li>• Marketing Strategy and Consultation</li> <li>• Help develop and advance a university marketing strategy and create growth tactics</li> <li>• Development of large-scale campaigns</li> <li>• Competitive analysis</li> </ul>	<ul style="list-style-type: none"> <li>• Assist in the development of a university wide marketing strategy</li> <li>• Support the university with large scale marketing campaigns</li> <li>• Provide insights through marketing analytics</li> <li>• Comparative analysis, data analysis and market research</li> </ul>

	<ul style="list-style-type: none"> <li>• Creation of quantitative marketing insights</li> <li>• Create plans for use of VR and AR in future design and marketing to ensure our brand is innovating</li> <li>• Develop a university wide Digital Strategy</li> <li>• Conduct market research and develop brand position</li> <li>• Strong understanding of PPC and programmatic advertising – keyword research, audience research, ad management and monitoring</li> <li>• User Experience mapping and planning</li> <li>• Stakeholder consultations</li> <li>• Marketing writer(s)</li> </ul>	<ul style="list-style-type: none"> <li>• Assist in the facilitation of media buying and placement (both print and digital)</li> </ul>
<b>Stakeholder Engagement</b>	<p>Includes but is not limited to:</p> <ul style="list-style-type: none"> <li>• Strategic advice for stakeholder engagement</li> <li>• Public affairs support – positioning University strengths</li> <li>• Communications</li> </ul>	<ul style="list-style-type: none"> <li>• General Strategic Communications, Issues Management and Public Affairs support</li> <li>• Provides situational and contextual briefings for relevant and timely issues related to the post-secondary sector and act as a sounding board for opportunities within the current context</li> <li>• Provides public affairs and strategic communications advice, positioning the University's strengths and unique impact locally, regionally, nationally and globally</li> <li>• Supports the development of a strategic stakeholder engagement plan and corresponding communications and positioning materials</li> <li>• Supports the development and delivery of briefings and presentations to the University leadership</li> <li>• Provides briefings and strategic advice and analysis of legislation, policies and programs, and regulations which may impact university business</li> <li>• Identifies and builds reputational and thought leadership opportunities</li> </ul>

Respondents may submit for all or some of the categories as listed. Requested and mandatory documents for each category will be outlined in the University's submission portal, and in the RFSQ documents.

## B. MATERIAL DISCLOSURES

The material disclosures that apply to this RFSQ, if any, are set out below.

### 1. Roles and Responsibilities

#### Qualified Suppliers Responsibilities

- Provide fully vetted, qualified resources to work on the engagement project.
- Provide advanced notice of any accommodations required for proposed.
- Bring Your Own Device (BYOD) may be a requirement.
- Deliver clear, concise and professional deliverables.
- Accurately report all charges and expenses incurred in the execution of this work.
- Abide by University policies and procedures where applicable.
- Be available to work on site, when required.

- All data related to engagements will be stored on the University’s central servers – no data will be stored on the Qualified Supplier’s devices.
- Report any risks or concerns immediately to the Primary Contact with recommended mitigation options.
- Participate in a post engagement review when requested.

#### University’s Responsibilities

##### General

- Provide a Primary Contact for the consultant for this engagement
- Provide appropriate access to the network, facilities and personnel as required
- Provide the appropriate hardware and workspace for use while working onsite
- Provide access to knowledgeable staff that may be required during the engagement
- Provide access to the appropriate decision-making authority during the engagement
- Address any accommodations as agreed to for this engagement

##### Primary Contact

- Serve as the interface between the Supplier and the University.
- Ensure workspace facilities are available for the consultant(s) that may include work area, printer/network connectivity, phone and any specific accommodations, where required.
- Provide information, data, decisions and approvals, within 2 working days of Consultant’s request, unless both parties agree to an extended response time.
- Resolve deviations from project plans that may be caused by the University.
- Help resolve project issues, and escalate issues within the University’s organization.
- Monitor and report project status on a regular basis.
- Conduct post engagement reviews

### **C. MANDATORY SUBMISSION REQUIREMENTS**

#### **1. Appendix B - Submission Form**

Each response must include an Appendix B - Submission Form completed and signed by an authorized representative of the Respondent.

#### **2. Appendix C – Pricing Proposal**

Each response must include pricing information that complies with the instructions contained in Appendix C – Pricing Proposal.

#### **3. Other Mandatory Submission Requirements**

N/A.

### **D. MANDATORY TECHNICAL REQUIREMENTS**

N/A.

### **E. PRE-CONDITIONS OF AWARD**

N/A

### **F. RATED CRITERIA**

The following sets out the categories, weightings and descriptions of the rated criteria of the RFSQ. Respondents who do not meet a minimum threshold score for a category will not proceed to the next stage of the evaluation process.

<b>Rated Criteria Category</b>	<b>Weighting (Points)</b>
1. Firm Profile (Appendix A -Common Rated Criteria)	20 points
2. Experience (Appendix A- Service Category Rated Criteria)	40 points



3. Methods and Approach (Appendix A- Service Category Rated Criteria)	20 points
4. Pricing Proposal (Appendix C)	20 points
5. Presentations	20 points
<b>Total Points</b>	<b>120 points</b>

## Common Rated Criteria

Respondents should be able to demonstrate their extensive experience working on projects for higher education and public sector institutions of a similar size and complexity, and demonstrate a good understanding of the University's environment including work with a variety of stakeholders like students, all levels of government and the general public.

Respondents are asked to provide information in strictly the same order of the category listed below.

Do **NOT** include pricing or financial information in this Appendix.

### 1. Firm Profile - 20 points (Maximum 3 pages)

Respondents should provide the following in its proposal:

- (a) A brief description of the firm.
- (b) Provide a list of three (3) projects demonstrating experience in providing services to clients of similar scope and complexity within the past three (3) years. Include the name and contact information of the client staff member most closely associated with the work performed using Appendix B Submission Form, Item 11 References.
- (c) Describe your firm's knowledge of post-secondary institutions, and the academic environment and culture, trends and challenges.

## Service Category Rated Criteria

Respondents are asked to provide information in strictly the same order of the category listed below.

**For each service category that respondents are proposing, Respondents are requested to submit the Service Category Rated Criteria Appendix and respond to the following questions:**

### 2. Experience - 40 points

- (a) Respondents are requested to describe one project including scope, timelines, challenges, outcomes, and lessons learned, that illustrates the competency and experience in each service category for which the Respondent is submitting. **(Maximum 2 pages)**
- (b) Respondents should demonstrate experience specific to each service category listed below, use examples of actual work performed where possible; **(Maximum 3 pages)**

Crisis Management	<ul style="list-style-type: none"> <li>• Describe direct experience with the University sector dealing with communications around conflict, crisis, controversial and reputational issues.</li> <li>• Describe experience in communications with both external and internal stakeholders.</li> <li>• Describe a typical crisis management strategy.</li> </ul>
Marketing Strategy & Planning	<ul style="list-style-type: none"> <li>• Demonstrate full marketing capabilities.</li> <li>• Describe a typical public sector marketing strategy.</li> <li>• Describe a measurement and analytics management strategy.</li> </ul>

Stakeholder Engagement	<ul style="list-style-type: none"> <li>• Describe direct experience with relevant policies and regulations that impact higher education.</li> <li>• Demonstrate a national presence, with multiple offices across Canada.</li> <li>• Describe diversity of expertise, with all three levels of government.</li> <li>• Describe experience working with diverse stakeholders, such as students, government agencies, internal and external communities.</li> </ul>
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**3. Methods and Approach - 20 points (Maximum 4 pages)**

For each service category, provide a description of the methods and approach to an engagement, to include but not be limited to;

- Consultation
- Communication
- Results Monitoring
- Contingency Plan

**4. Pricing (20 points)**

To establish the Qualified Supplier list, pricing points will be assigned based on the submitted costs. When the second stage process occurs and the deliverables are identified, a specific quote using the submitted pricing will be requested. For more information see Appendix C – Pricing Proposal.

**5. Presentations**

The University may invite top two ranked Respondents from each category, after Stage 2 to present to Evaluators. In the event of a tie for third rank, both Respondents for each category will be invited to present. The purpose of the presentation is to confirm information in the proposal, scores assigned in previous stages may be adjusted based on the presentation. Only those Respondents selected to make presentations are eligible for the points allocated for the presentations.

**G. NON RATED CRITERIA**

**Accessibility**

Provide information on accessibility features and services available, which may include those to address vision or hearing impairment, mobility issues and use of common assistive devices/technology or service animals. Include any related costs for accessibility features and services.

## APPENDIX B – SUBMISSION FORM

### 1. Respondent Information

Please fill out the following form, naming one person to be the Respondent's contact for the RFP process and for any clarifications or communication that might be necessary.	
Full Legal Name of Respondent:	
Any Other Relevant Name under which Respondent Carries on Business:	
Street Address:	
City, Province/State:	
Postal Code:	
Phone Number:	
Company Website (if any):	
Respondent Contact Name and Title:	
Respondent Contact Phone:	
Respondent Contact Email:	

### 2. Acknowledgment of Non-Binding Procurement Process

The Respondent acknowledges that the RFP process will be governed by the terms and conditions of the RFP, and that, among other things, such terms and conditions confirm that this procurement process does not constitute a formal, legally binding bidding process (and for greater certainty, does not give rise to a Contract A bidding process contract), and that no legal relationship or obligation regarding the procurement of any good or service will be created between the University and the Respondent unless and until the University and the Respondent execute a written agreement for the Deliverables.

### 3. Ability to Provide Deliverables

The Respondent has carefully examined the RFP documents and has a clear and comprehensive knowledge of the Deliverables required. The Respondent represents and warrants its ability to provide the Deliverables in accordance with the requirements of the RFP for the rates set out in its proposal.

### 4. Non-Binding Pricing

The Respondent has submitted its pricing in accordance with the instructions in the RFP and in Appendix C – Pricing Proposal in particular. The Respondent confirms that the pricing information provided is accurate. The Respondent acknowledges that any inaccurate, misleading or incomplete information, including withdrawn or altered pricing, could adversely impact the acceptance of its proposal or its eligibility for future work.

### 5. Addenda

The Respondent is deemed to have read and taken into account all addenda issued by the University prior to the Deadline for Issuing Addenda. The onus remains on the Respondent to make any necessary amendments to the proposal based on the addenda.

### 6. No Prohibited Conduct

The Respondent declares that it has not engaged in any conduct prohibited by this RFP.

### 7. Conflict of Interest

For the purposes of this section, the term “Conflict of Interest” means;

- (a) in relation to the RFP process, the Respondent has an unfair advantage or engages in conduct, directly or indirectly, that may give it an unfair advantage, including but not limited to;
  - (i) having, or having access to, confidential information of the University in the preparation of its proposal that is not available to other Respondents
  - (ii) communicating with any person with a view to influencing preferred treatment in the RFP process (including but not limited to the lobbying of decision makers involved in the RFP process), or
  - (iii) engaging in conduct that compromises, or could be seen to compromise, the integrity of the RFP process; or
  
- (b) in relation to the performance of its contractual obligations contemplated in the contract that is the subject of this procurement, the Respondent’s other commitments, relationships or financial interests;
  - (i) could, or could be seen to, exercise an improper influence over the objective, unbiased and impartial exercise of its independent judgement, or
  - (ii) could, or could be seen to, compromise, impair or be incompatible with the effective performance of its contractual obligations.

The Respondent must declare all potential Conflicts of Interest, as defined in section 3.4.1 of the RFP. This includes disclosing the names and all pertinent details of all individuals (employees, advisers, or individuals acting in any other capacity) who (a) participated in the preparation of the proposal; or (b) were employees of the University within twelve (12) months prior to the Submission Deadline.

If the box below is left blank, the Respondent will be deemed to declare that;

- (a) there was no Conflict of Interest in preparing its proposal and;
- (b) there is no foreseeable Conflict of Interest in performing the contractual obligations described in the Deliverables.

Otherwise, if the statement below applies, check the box.

The Respondent declares that there is an actual or potential Conflict of Interest relating to the preparation of its proposal, and/or the Respondent foresees an actual or potential Conflict of Interest in performing the contractual obligations contemplated in the RFP.

If the Respondent declares an actual or potential Conflict of Interest by marking the box above, the Respondent must set out below details of the actual or potential Conflict of Interest:

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**8. Disclosure of Litigation**

The Respondent declares that neither the firm nor any of its principles has a claim or has initiated a legal proceeding against the University, and that the University has no claim nor has initiated a legal proceeding against the Respondent. If such claim or proceeding exists, provide details.

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**9. Disclosure of Information**

The Respondent hereby agrees that any information provided in this proposal, even if it is identified as being supplied in confidence, may be disclosed where required by law or by order of a court or

tribunal. The Respondent hereby consents to the disclosure, on a confidential basis, of this proposal by the University to the advisers retained by the University to advise or assist with the RFP process, including with respect to the evaluation this proposal.

**10. Canadian Competition Act**

The Respondent hereby confirms that this proposal has been made without any connection, comparison of figures, or arrangement with, or knowledge of, any other Corporation, Firm or Person making a Proposal for the same work.

**11. References**

Respondents are requested to provide three (3) references from clients who have obtained similar goods and services for a client of similar size and complexity to the University, to those requested in the RFP from the Respondent in the last three (3) years. Contact information must be included.

<b>Company Name:</b>	
<b>Company Address:</b>	
<b>Contact Name and Title:</b>	
<b>Contact Telephone Number:</b>	
<b>Contact Email Address:</b>	
<b>Date Work Undertaken:</b>	
<b>Nature of Assignment:</b>	
<b>Company Name:</b>	
<b>Company Address:</b>	
<b>Contact Name and Title:</b>	
<b>Contact Telephone Number:</b>	
<b>Contact Email Address:</b>	
<b>Date Work Undertaken:</b>	
<b>Nature of Assignment:</b>	
<b>Company Name:</b>	
<b>Company Address:</b>	
<b>Contact Name and Title:</b>	
<b>Contact Telephone Number:</b>	
<b>Contact Email Address:</b>	
<b>Date Work Undertaken:</b>	
<b>Nature of Assignment:</b>	

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Signature of Respondent Representative

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Name of Respondent Representative

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Title of Respondent Representative

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Date

I have the authority to bind the Respondent.

## APPENDIX C – PRICING PROPOSAL

### 1. Instructions on How to Provide Pricing

- (a) Respondents should provide the information requested under section 3 below (“Required Pricing Proposal Information”) by reproducing and completing the table below in their proposals, or, if there is no table below, by completing the attached form and including it in their proposals.
- (b) Pricing must be inclusive of all applicable duties and taxes except for HST. Pricing must be provided in CDN currency.
- (c) Rates quoted by the Respondent must be all-inclusive and must include all labour and material costs, all travel and carriage costs, all insurance costs, all costs of delivery, all costs of installation and set-up, including any pre-delivery inspection charges, and all other overhead, including any fees or other charges required by law.

### 2. Evaluation of Pricing Proposal – 20 Points

Pricing will be scored based on a relative pricing formula using the rates set out in the pricing form. Pricing will receive a percentage of the total possible points allocated to price for the particular category, which will be calculated in accordance with the following formula:

$$\text{Lowest price} \div \text{Respondent's price} \times \text{Weighting} = \text{Respondent's pricing points}$$

### 3. Required Pricing Proposal Information

Respondents are required to provide pricing for each category as outlined below. The roles listed will be used in the pricing evaluation. Respondents may supply description of roles and hourly rates for other typical roles for the deliverables as described for reference purposes only.

#### Crisis Management

Description of Roles	Hourly Rate
Managing Principle	
Communications Director	
Public Relations Manager	
Team Leader	

#### Marketing Strategy and Planning

Description of Roles	Hourly Rate
Marketing Director	
Marketing Manager	
Communications Director	
Communications Manager	

#### Stakeholder Engagement

Description of Roles	Hourly Rate
Managing Principle	
Communications Director	
Public Relations Manager	
Team Leader	

## APPENDIX D – FORM OF AGREEMENT

### MASTER FRAMEWORK AGREEMENT (Master Agreement)

This Agreement is entered into between:

**University of Guelph**  
50 Stone Road East  
Guelph, Ontario N1G 2W1  
(University)

And

**Enter Supplier Name**  
**Enter Supplier Address**  
(Supplier)

#### Whereas:

The Supplier has agreed to provide, and the University has agreed to accept the deliverables as described in **RFSQ-2023-F315 Communications and Marketing Professional Services VOR**, subject to the terms and conditions of this Agreement.

The documents forming this Agreement are as listed, if there is ambiguity or a discrepancy in the documents, The precedence of documents shall be as follows:

1. The Terms and Conditions of this Agreement, all appendices and any fully executed amendments
2. The Supplier's response to the above named RFP
3. The above mentioned RFP documents as issued by University of Guelph
4. The final Purchase Order

**TERM** – The term of this Agreement is as follows;

Initial Term Start Date **Enter Start Date**  
Initial Term End Date **Enter End Date**  
Optional Extensions **Enter number and length of extensions**

**WHEREAS**, the University wishes to enter in to an Agreement for provide **Insert name of Deliverables** (Deliverables);

**AND WHEREAS**, the Supplier was selected to be included on a Qualified Supplier Roster for eligibility to participate in potential second-stage selection processes for the procurement of the Deliverables;

**NOW THEREFORE**, the parties agree as follows:

#### 1. **Survival**

The expiry or termination of the Master Agreement shall not relieve the Supplier of any of its obligations under any existing contract for the Deliverables. This paragraph shall survive any termination of the Master Agreement.

#### 2. **The University and Supplier Representatives**

The University Representative and contact information for the Master Agreement is:



[\*insert name and title of The University's representative in charge of the contract and contact details, including mailing address and email address\*]

The Supplier Representative and contact information for the Master Agreement is:

[\*insert name and title of Supplier representative in charge of the contract and contact details, including mailing address and email address\*]

The Supplier acknowledges and agrees that the Supplier Representative named above has authority to legally bind the Supplier.

### **3. Scope of Master Agreement**

- 3.1 This Master Agreement governs the relationship between the University and the Supplier in respect of the potential provision of the Deliverables by the Supplier to the University.
- 3.2 The Supplier acknowledges that there is no obligation whatsoever on the University to invite or select the Supplier to provide any Deliverables under this Master Agreement.
- 3.3 No undertaking or any form of statement, promise, representation or obligation shall be deemed to have been made by the University in respect of the total quantities or values of the Deliverables to be requested by them pursuant to this Master Agreement and the Supplier acknowledges and agrees that it has not entered into this Master Agreement on the basis of any such undertaking, statement, promise or representation.
- 3.4 The Supplier acknowledges that in entering into this Master Agreement no form of exclusivity has been conferred on, or volume guarantee has been granted by the University in relation to the provision of the Deliverables by the Supplier and that the University is at all times entitled to enter into other contracts and agreements with other Suppliers for the provision of any or all services or goods which are the same as or similar to the Deliverables.

### **4. Management of The Qualified Supplier Roster**

- 4.1 The Supplier acknowledges that, during the term of this Master Agreement, the University may permit other suppliers to apply for qualification and inclusion on the Qualified Supplier Roster. The same qualification requirements, evaluation process and Master Agreement that are set out in the RFSQ will apply to the ongoing application process for the purpose of qualifying new suppliers for inclusion on the Qualified Supplier Roster.
- 4.2 The Supplier acknowledges that, during the term of this Master Agreement, The University may suspend or remove suppliers from the Qualified Supplier Roster for reasons of poor performance, conflict of interest or unethical conduct in respect of the provision of Deliverables.
- 4.3 If suspended from the Qualified Supplier Roster, the Supplier will not be invited to participate in any second-stage selection process during the period of suspension. If removed from the Qualified Supplier Roster, the Supplier will not be eligible to re-qualify during the term of the Qualified Supplier Roster.

### **5. Selection for Provision of Deliverables**

- 5.1 The Supplier is a potential provider of the Deliverables and the Supplier may be selected to provide the Deliverables during the term of this Master Agreement.
- 5.2 If and when Deliverables are required, the University will invite or select a Supplier to provide the Deliverables in accordance with the following:

Category	Estimated Project Value	Minimum # of Invited Qualified Suppliers	Method of Procurement
1			
2			
3			
4			
5			

The selection of Suppliers to be invited to any second-stage selection process outlined above will be selected on a rotational basis.

**6. Contract for Provision of Deliverables**

6.1 If the Supplier is selected to provide the Deliverables, the provision of the Deliverables will be governed by one of the following forms of contract:

(a) The University's standard Form of Agreement;

**OR**

(b) State other forms of contract that may be used. A Statement of Work and quote provided by the Supplier and approved by the University.

6.2 The applicable form of contract for the Deliverable will be specified at the time of the second-stage selection process, as well as any Special Provisions that will apply.

**7. Execution**

This Agreement may be executed and scanned and delivered by electronic transmission, and when so executed and delivered, will be deemed an original.

Signatories below have the authority to bind their organization;

University of Guelph

Enter Supplier Name

Name \_\_\_\_\_

Name \_\_\_\_\_

Title \_\_\_\_\_

Title \_\_\_\_\_

Signature \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

Date \_\_\_\_\_

Name \_\_\_\_\_

Name \_\_\_\_\_

Title \_\_\_\_\_

Title \_\_\_\_\_

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Signature \_\_\_\_\_

Date \_\_\_\_\_

Date \_\_\_\_\_