



ONTARIO COLLEGE OF TRADES

ORDRE DES MÉTIERS DE L'ONTARIO

***Design for the 2013 Annual Report
for the
Ontario College of Trades (the College)***

Request for Proposal (RFP) No. OCOT/CM/2014-02

Date Issued: March 14, 2014

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A. INTRODUCTION

1. Objective

The purpose of this Request for Proposal (RFP) is to solicit qualified offers for graphic design services of the 2013 Annual Report for the Ontario College of Trades (the College) as outlined in the Terms of Reference (Annex B), with a contract start date of March 31, 2014.

You are invited to submit your best technical and financial offer for the requested services. Your proposal could form the basis for a contract between your company, or you as an individual, and the College.

2. Background Information

The Ontario College of Trades is a new regulatory body established by the *Ontario College of Trades and Apprenticeship Act, 2009* (Act). The College has a duty to serve and protect the public interest in carrying out a number of objects and functions under the Act. This includes, but is not limited to, establishing the scope of practice, regulating practice, governing members and modernizing skilled trades in Ontario. With the launch of membership activity in January 2013, the College performs standard regulatory functions such as:

- Issuing licenses and certificates of membership;
- Protecting the public interest through investigation and discipline mechanisms;
- Setting standards for training and certification;
- Conducting research and collecting relevant data to support future apprenticeship and certification policies;
- Removing barriers and increasing access for internationally trained workers.

The College of Trades office is located in Toronto. More information about the College of Trades can be found at www.collegeoftrades.ca

B. INSTRUCTIONS TO BIDDERS

1. Language of the Proposal and other Documents

All correspondence and documents relating to the proposal exchanged between the bidder and the College shall be in English language.

2. Cost of the Proposal

The bidder shall bear all costs associated with the preparation and submission of the proposal up to the final award of the contract. The College will in no case be responsible or liable for those costs regardless of the conduct or outcome of the procurement process.

3. Validity of the proposal

The proposal shall be valid for 90 days after the closing date of proposal submission as specified in this RFP. A proposal valid for a shorter period will be rejected by the College as non-responsive. The College may solicit the bidder's consent for an extension of the period of validity under exceptional circumstances.

4. Contents of the Proposal

The bidder is expected to examine all corresponding instructions, forms, and terms and specifications contained in this RFP.

5. Joint Proposal

Two or more companies may form a consortium and submit a joint proposal if this helps in finding a team capable of undertaking all elements of the anticipated work. Such a proposal must be submitted under the name of one member of the consortium - hereinafter "lead organization." The lead organization will be responsible for undertaking all negotiations and discussions with the College and performing the contract.

6. Communications during the RFP Period

Interested companies/individuals shall acknowledge receipt and their intent to bid for this RFP by email to procurement@collegeoftrades.ca no later than **5:00PM on Wednesday, March 19, 2014.**

The acknowledgement shall provide company/individual's name, telephone number and the name of a contact person.

All inquiries regarding this RFP should be directed in writing (via email only) to procurement@collegeoftrades.ca before **5:00PM on Thursday March 20, 2014.**

Bidders are encouraged to submit their questions as soon as they are known, in order to receive earlier responses from the College. All questions and answers will be shared with all Bidders.

7. Proposal structure

The proposal shall consist of two parts: **the technical**, containing the technical specifications for services/products/works and **the financial**, containing pricing information, to be submitted separately in two different envelopes as outlined in section 8 below.

The proposal shall be organized in the following manner:

7.1 Proposal Submission Form (to be submitted with the technical proposal)

- completed Submission Form (Annex A of this RFP)

7.2 Technical Proposal

The Technical Proposal shall contain no price or cost information. Based on the Terms of Reference of this RFP (Annex B) the Technical Proposal must include the following sections:

- a) **Company Profile and Experience**
 - Your experience in designing annual reports or annual publications
- b) **Proposed Work-Plan**
 - Provide proposed implementation plan/approach as per the Terms of Reference (including assumptions)
- c) **Proposed Project Team Members**
 - Provide short bio of the members of the proposed team including their specific responsibilities/tasks on this project, relevant experience, and qualifications.
- d) **Previous Experience and Clients**
 - Provide the organization name, and contact name, e-mail address and telephone numbers for three organizations that the College could call as references within the RFP schedule timelines.

7.3 Financial Proposal

The Financial Proposal will include:
(Annex C- Price Schedule)

- a) Costs/Fees
- b) A proposed schedule of payments

Depending on the proposed methodology Financial Proposal will cover all the services to be provided, and must itemize all the costs.

Payments shall be based upon output, i.e. delivery of the services specified in the TOR.

The price indicated in the financial proposal will be a part of contractual agreement. Please state all costs clearly and completely; the College will not accept nor pay any hidden costs or costs not disclosed in response to this RFP.

All prices are to be quoted in Canadian Dollars; GST/HST (Goods and Services Tax/ Harmonized Sales Tax) to be shown separately.

The College's general policy is to pay for the performance of contractual services rendered or to effect payment upon the achievement of specific milestones described in the contract. Please note that the College does not make any advance payment.

Any request for an advance payment is to be justified and documented, and must be submitted with the financial proposal. The justification shall explain the need for the advance payment, itemize the amount requested and provide a time schedule for utilization of said amount.

8. Format and Submission of Proposals

The proposal must contain the signature of a duly authorized officer or agent of the company submitting the proposal (for companies only).

The proposal shall be submitted in **3 (three) hard copies** and **1(one) electronic version** (PDF version on a USB drive/CD). No email submissions will be accepted. The proposal shall be sealed in one outer and two inner envelopes as detailed below:

a) The outer envelope shall:

- be addressed to Ontario College of Trades at 655 Bay Street, Suite 600, Toronto, Ontario, M5G2K4

- be marked with:

"RFP No. OCOT/ CM/2014-02 "2013 Annual Report Design"

b) The two inner envelopes shall indicate the name and address of the proposer company.

-The first inner envelope shall include technical component and be marked with **"1-Technical Proposal, RFP No. OCOT/ CM/2014-02 "2013 Annual Report Design"**

- The second inner envelope shall include the price component and be marked with **"2-Financial Proposal, RFP No. OCOT/ CM/2014-02 "2013 Annual Report Design"**

The prospective companies/individuals achieving highest total scores might be invited to make a presentation to the selection panel of the College (see section C.4 for details).

9. Closing Date for Submission of Proposals

Proposals must be received at the College **no later than 5:00PM on Friday, March 28, 2014.**

Any proposal received by the College after the closing date mentioned above will be rejected.

The College may, at its own discretion, extend this closing date for the submission of proposals by notifying all participating companies thereof in writing.

10. RFP Timelines

- March 14, 2014: RFP release date
- March 19, 2014: Deadline for confirming the intent to bid
- March 20, 2014: Deadline for Submission of Questions
- March 28, 2014: Deadline for submission of proposals to the College
- April 11, 2014: Tentative Date for contract signing
- June 2, 2014: Report Launch/Distribution

The RFP timetable may be changed by the College in its sole discretion.

11. Modification and Withdrawal of Proposals

The bidder may withdraw its proposal any time after the proposal's submission and before the opening date, provided that written signed notice of the withdrawal (by a duly authorized representative of the bidder) via email is received by the College prior to the closing date.

No proposal may be modified after the closing date for submission of proposals, unless the College has issued an amendment to the RFP allowing such modifications (see section 12).

No proposal may be withdrawn in the interval between the opening date and the expiration of the period of proposal validity specified by the bidder in the proposal.

12. Amendments of the RFP

At any time prior to the closing date for submission of proposals, the College may, for any reason, whether on its own initiative or in response to a clarification requested by a bidder, modify the RFP by amendment. Amendments could include modification of project scope or requirements, project timeline expectations or extension of the closing date for submission.

All prospective bidders that have received the RFP will be notified in writing of all amendments to the RFP. In addition, all amendments will be posted on the College website in the Request for Proposals section and in any other website used by the College directly for publishing the Request for Proposals.

13. Reservation of Rights

The College reserves the right to cancel the solicitation process and reject all the proposals at any time prior to award of the contract without thereby incurring any liability to the affected bidder(s) or any obligation to provide information on the grounds for the buyer's action.

A proposal that is rejected by the College may not be made responsive by the bidder by correction of the non-conformity. A responsive proposal is defined as one that conforms to all the terms and conditions of the College's solicitation documents without material deviations. The College shall determine the responsiveness of each proposal with the College's proposal solicitation documents.

By submitting a proposal, the Bidder indicates agreement to all of the terms of the procurement process set out in this RFP.

14. Conflict of Interest

The Bidder must not engage in any Conflict of Interest. In this Request for Proposals, "Conflict of Interest" includes, but is not limited to, any situation or circumstance where, in relation to the Request for Proposals process, the Bidder has an unfair advantage or engages in conduct, directly or indirectly, that may give it an unfair advantage, including:

- (a) having, or having access to, information in the preparation of its submission that is confidential to the College and not available to other Bidders;
- (b) communicating with any person with a view to influencing the Request for Proposals process to receive preferred treatment; or
- (c) engaging in conduct that compromises, or could be seen to compromise, the integrity or competitiveness of Request for Proposals process and render that process non-competitive and unfair.

15. Confidentiality

Bidders and the College are required to maintain the confidentiality of information provided to each through this RFP process.

C. EVALUATION OF PROPOSALS

1. Clarification of Proposals

The College may, at its discretion, ask any bidder for clarification of any part of its proposal to assist in the examination, evaluation and comparison of proposals. The request for clarification and the response shall be in writing. No change in price or substance of the proposal shall be sought, offered or permitted during this exchange.

2. Preliminary Examination of Proposals

The College shall examine the proposals to determine whether they are complete, whether any computational errors have been made, whether the documents are properly signed and whether the proposals are generally in order.

Prior to the detailed evaluation, the substantial responsiveness of each proposal to the RFP will be determined in a preliminary examination. For purposes of these clauses, a substantially responsive proposal is one that conforms to all the terms and conditions of the RFP without material deviations. The Buyer's determination of proposal responsiveness is based on the contents of the proposal itself without recourse to extrinsic evidence.

A proposal determined as not substantially responsive may be rejected and will not subsequently be made responsive by the bidder by correction of the non-conformity.

Arithmetical errors shall be rectified on the following basis: If there is a discrepancy

between the unit price and the total price that is obtained by multiplying the unit price and quantity, the unit price shall prevail and the total price shall be corrected. If the Bidder does not accept the correction of errors, its proposal shall be rejected. If there is a discrepancy between words and figures, the amount in words shall prevail.

Please note that the College is not bound to select any of the companies submitting proposals. Furthermore, since a contract would be awarded in respect of the proposal which is considered most responsive to the needs of the project concerned, due consideration being given to the College's general principles, including economy and efficiency, the College does not bind itself in any way to select the firm/institution offering the lowest price.

3. Evaluation of Proposals

A two-stage procedure will be utilized in evaluating the proposals, with evaluation of the technical proposal being completed prior to any financial proposal being opened and compared. The financial proposal will be opened only for those bidders, whose technical proposal reaches 400 points, meeting the requirements for the RFP. The total number of points which a bidder may obtain for technical and financial proposals is 1000 points.

a. Technical Evaluation

The technical proposal will be evaluated on the basis of its responsiveness to the Terms of Reference in Annex B; section 7.3; and the evaluation criteria below:

- Relevant Experience (150)
- Samples of work (200)
- Proposed Team (150)
- Proposed work plan (200)

The obtainable number of points specified for each evaluation criterion indicates the relative significance or weight of the item in the overall evaluation process. The points allocated to the technical proposal correspond to 70% of the total obtainable points (700 points).

The maximum number of points for the price component is 30% of the total obtainable points. This maximum number of points will be allocated to the lowest price proposal (300 points).

b. Financial Evaluation

The financial proposal will only be evaluated if the technical proposal achieves a minimum of 400 points. Proposals failing to obtain this minimum threshold will not be eligible for further consideration.

The financial proposal is evaluated on the basis of its responsiveness to the Price Schedule Form (Annex C). The maximum number of points for the price proposal is 300. This maximum number of points will be allocated to the lowest price. All other proposals will receive points in inverse proportion according to the following formula:

Price Offer Points = $\frac{[\text{Max. number of points for the Price Offer}]}{[\text{Lowest price}]}$

a Proposal being evaluated

[Price offer being evaluated]

c. Total Score

The total score for each bidder will be the weighted sum of the technical score and financial score. The maximum total score is 1000 points.

4. Bidders' Presentations

At the discretion of the College, selected bidders may be invited to supply additional information on the contents of their proposal during the evaluation period. Such bidders could be asked to make a presentation of their proposal (possibly with an emphasis on a topic of the College's choice) followed by a question and answer session. If the College determines that there is such a need, the presentation will be held at the College office.

5. Award of Contract

The College shall award the contract to the bidder who obtains the highest combined score of the technical and price evaluation.

The successful Bidder will be required to enter into an agreement with the College (the template is available upon request) and to provide a mutually agreed list of scope and deliverables outlining the services and fees, consistent with the services and fees agreed upon through this procurement process.

5. Right to Vary Requirements at Time of Award

The College reserves the right at the time of award of contract to vary the quantity of services and goods specified in the RFP without any change in price or other terms and conditions.

6. Payment Provisions

Payment will be made upon performance of contractual services/specific milestones described in the contract and receipt of a satisfactory invoice duly supported by specified release documents and other documents called for under the Contract.

ANNEX A: PROPOSAL SUBMISSION FORM

To: Ontario College of Trades
RFP No. OCOT/ CM/2014-02

Dear Sir / Madam,

The undersigned, having read the solicitation documents of Request for Proposal No. OCOT/ CM/2014-02, hereby offers to provide the services, in accordance with any specifications stated and subject to the Terms and Conditions set out or specified in the document.

We agree to accept 90 (ninety) calendar days validity for this proposal from the date of its submission. This proposal shall remain binding upon us and may be accepted at any time before the expiration of that period.

We undertake, if our proposal is accepted, to commence and complete delivery of all items in the contract within the time frame stipulated.

We understand that you are not bound to accept any proposal you may receive and that a binding contract would result only after final negotiations are concluded on the basis of the technical and price components proposed.

Authorized Signature:.....

Name:

Title:

Company:.....

Company Address:

Contact Person:

Email address

Phone/Fax/Website

Dated thisday of [year].

ANNEX B: TERMS OF REFERENCE

Overview

Ontario College of Trades (the College) is seeking qualified candidates/companies to carry out the design for the 2013 Annual Report. The Annual Report will be available in both print and online distribution formats. The Annual Report will highlight the College's 2013 activities, achievements and the summary of financials.

About the College of Trades

The Ontario College of Trades is a new regulatory body established by *the Ontario College of Trades and Apprenticeship Act, 2009 (Act)*. The College has a duty to serve and protect the public interest in carrying out a number of objects and functions under the Act. This includes, but is not limited to, establishing the scope of practice, regulating practice, governing members and modernizing skilled trades in Ontario. With the launch of membership activity in January 2013, the College performs standard regulatory functions such as:

- Issuing licenses and certificates of membership;
- Protecting the public interest through investigation and discipline mechanisms;
- Setting standards for training and certification;
- Conducting research and collecting relevant data to support future apprenticeship and certification policies;
- Removing barriers and increasing access for internationally trained workers.

The College of Trades office is located in Toronto. More information about the College of Trades can be found at www.collegeoftrades.ca

About the Annual Report

Each year, the College reports to its members by the end of June through its Annual Report. The Annual Report communicates the impact the College has on the trades in province, the work that has been completed during the past fiscal year and acknowledges its members. The report will be written to highlight the College's priorities. More about the College's mandate can be found [here](#).

Scope of Services, Deliverables and Schedule

Design Development and Presentation (Approx. 24 pages plus cover)

- Provide full-sized, full-colour mock-up of the recommended design showing the following:

- 3 cover options
- Section openings and text spreads
- Information graphics
- Photography and illustration treatments

- Provide a proposed work plan as per College's timelines identified below

Typesetting and Page Layouts

- Typesetting and layout of a 44-page plus cover publication, including all text, captions, charts, graphs, etc. from final client-approved copy on file (*Word*). (Graph data will be supplied by the College on *Word* or *Excel* files.)
- Fine-tuning of typesetting for style and consistency, etc. Revised page layouts. Supply PDF file for the College's review.

Layout Colour Proofs

- Provision of colour proofs of the 24 pages-plus-cover and colour correction

Production Artwork

- Preparation of electronic files of publication for release to the printer. Detailed pre-press instructions for the printer to be supplied by designer.

Downloadable PDF Files

- Provision of web-ready PDF version of the final files

Project Management

- Meetings with the College's communication team as per the agreed work plan and the schedule of deliverables, update reports, etc. as required.

Anticipated Schedule

- March 14, 2014: RFP Issued
- March 24, 2014: Proposals Due by 5 pm
- March 28, 2014: Successful Applicant Notified
- May 30, 2014: Final Annual Report due by noon

Submission Requirements

Proposals shall include the following sections:

- Your experience in designing annual reports or annual publications
- Samples of your previous work
- Short bio of the team proposed for this work
- Contacts for three references for previously completed similar projects
- Total cost and fees for the assignment- itemized per the scope of work

Selection and Evaluation Criteria

Selection Criteria

The evaluation team will check proposals against the submission requirements listed in the section above. Proposals meeting all these requirements will then be assessed and scored against the desirable criteria listed below (the list is not in prioritized order):

Technical

- Relevant Experience (150)
- Samples of work (200)
- Proposed Team (150)
- Proposed work plan (200)

Financial

- Budget (300)

Timing/Duration

The Annual Report will be distributed in June, 2014

Inputs from the College

The College will provide the contractor with any additional background information needed and describe the College's business processes. Additional inputs needed may be requested in the response document as part of the proposed approach.

Technical Capacity

The technical ability, capacity, and flexibility of the bidder to perform the contract in a timely manner and on budget, as verified by, e.g., the quality of work samples, client references, demonstrated success in projects with similar requirements or a tour of vendor facility.

During the evaluation process, the College may require a bidder's representative to answer questions with regard to the proposal and/or require certain bidders to make a formal presentation to the evaluation team.

ANNEX C: PRICE SCHEDULE

All prices are to be quoted in Canadian Dollars, and HST to be shown separately. Please state all costs clearly and completely; the College will not accept nor pay any hidden costs or costs not disclosed in response to this RFP.

ITEM/SERVICE DESCRIPTION	QUANTITY	PRICE PER UNIT	DURATION (HOURS/DAYS)	TOTAL PRICE	HST
1. REPORT DESIGN ENGLISH 2. REPORT DESIGN FRENCH					
2. OTHER COSTS (PLEASE ITEMIZE, IF ANY)					
TOTAL					

b) Proposed schedule of payment.

Signature of Bidder _____

Name and title _____