



THE RIGHT SKILLS ► A PROVEN ADVANTAGE

REQUEST FOR PROPOSALS

(RFP # 8503)

**CUSTOMER SATISFACTION AND STAKEHOLDER
ENGAGEMENT RESEARCH**

**CLOSING:
2:00 PM (Pacific Standard Time)
November 9, 2007**

October 23, 2007

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REQUEST FOR PROPOSALS
(RFP# 8503)
CUSTOMER SATISFACTION AND STAKEHOLDER ENGAGEMENT - RESEARCH
PROVIDER

PURPOSE

The ITA wishes to select a research firm to develop and implement research tools and analyze data for the purpose of evaluating customer satisfaction with BC's apprenticeship system and the effectiveness of the ITA's engagement with key stakeholders.

BACKGROUND

General Context

The Industry Training Authority is a provincial crown agency with a mandate to govern, expand and improve BC's industry training and apprenticeship system. Specifically, it works with industry to establish and maintain training program standards; registers, tracks training progress and issues credentials to apprentices; promotes trades careers and works to build the supply of skilled workers for BC employers; and funds training programs in post-secondary institutions and the K-12 school system.

The ITA's customers are registered apprentices and their employers/sponsors. Other key stakeholders in the system are industry (associations and established Industry Training Organizations), labour unions and educators (K-12 and public and private post-secondary).

For more information, please visit www.itabc.ca

Specific Business Context

As a provincial government agency, the ITA is accountable for developing a Service Plan that is published in February each year, in which it outlines its major goals, strategies, measures and performance targets. Performance against these targets is then reported in an Annual Report published the following May.

In order to report progress against several of these Service Plan measures, the ITA conducts regular customer and stakeholder research. These goals and measures are:

1. Ensure high quality program standards and high levels of satisfaction with ITA customer service
 - Evaluated to date through an annual Customer Satisfaction Index (CSI) survey; and

2. Ensure high levels of stakeholder awareness and intent to participate, through effective communications and marketing
 - evaluated to date through a) an annual Stakeholder Awareness Index (SAI) survey; and
 - b) an annual survey of youth intent to pursue trades careers

For more information on current goals and research programs, please refer to the 2007/08-2009/10 Service Plan, 2006/07 Annual Report and 2006/07 CSI and SAI Research Report, all located online at <http://www.itabc.ca/AboutITA-reports.php>.

PROJECT REQUIREMENTS & SCOPE

Scope

The ITA is seeking the services of a qualified research firm to meet its 2007/08 customer and stakeholder research requirements as outlined in detail below.

It is estimated that the contract would commence in approximately November 2007 and conclude in approximately May 2008 with an option to renew for two more years.

Required Services

1) *Customer Satisfaction*

Full details about last year's CSI survey, including methodology and high-level results, are available in the research report listed above.

The ITA wishes to continue with this survey in order to report a comparable Customer Satisfaction Index annually. However, we believe we can gain efficiencies by significantly reducing the number of management information questions on the survey. We would like to explore the benefits and feasibility of complementing the high-level survey questions with focus groups as a means of obtaining more meaningful information.

We would also like to review the survey methodology and sampling plan, with a goal of increased efficiency. The survey is conducted by telephone as we do not have reliable email contact information for the majority of our customers. The sample size has traditionally been large in order to provide acceptable margins of error when data is segmented by industry sector. We are open to discussion about these factors.

Finally, we feel that we can extract greater insight from the data already available to us from the last three years' surveys, including areas of priority for future surveys.

Scope of work related to the Customer Satisfaction Index will include:

- Review and analysis of last 3 years of data, to identify areas of priority for future research
- Refinement/updating of survey instrument, including retention of current “overall” questions and development of select, new management information questions
- Development of sampling plan and survey methodology (ITA to provide customer contact data)
- Recommendation regarding use of focus groups to complement survey
- Data collection/survey implementation
- data analysis, reporting and recommendations
- presentation of findings to ITA management and board of directors

2) Stakeholder Research

The ITA has been in operation for nearly four years. While stakeholder awareness was a useful indicator in the early part of our mandate, it is no longer the most meaningful measure of our stakeholder relationships at this more mature stage of organizational development. Instead, we wish to establish a new measure and research model that helps us evaluate, manage and publicly report on the effectiveness of our stakeholder relationships. This may include quantitative or qualitative research or a combination of the two.

It is our intention to replace the Stakeholder Awareness Index measure in our Service Plan with a measure stated “Effectiveness of Stakeholder Relationships”. The target for 2008-09 will be to establish a method of measurement and a baseline.

Scope of work related to stakeholder engagement will include:

- Review of last 3 years of data
- Discussion re: research objectives
- Recommendation re: new goal and measure
- Development of research tool(s)
- Development of sampling plan and survey methodology (ITA can provide some stakeholder lists, but has concerns that there is burnout among these groups after three years of surveying)
- Data collection/survey implementation
- Analysis of data, reporting and recommendations
- Presentation of findings to ITA management and board of directors

Project Timeline

It is the ITA's expectation that work for both surveys will be done in accordance with the following timeline:

November – Planning
December – Survey design
January – Data collection
February – Data analysis and report development
March – Presentation of results

Project must be completed by the end of the ITA's fiscal year on March 31st.

EVALUATION CRITERIA

Mandatory Criteria

The following are mandatory requirements. Responses not clearly demonstrating that they meet the mandatory criteria will receive no further consideration during the evaluation process.

1. The proposal must be received by email at mriback@itabc.ca before the specified closing date and time
2. The proposal must be in English
3. The proposal must be sent in electronic copy (Word or PDF format) by e-mail
4. The proposal is electronically signed as required by this RFP

Desirable Criteria

Each proposal will be reviewed prior to the selection process for completeness and adherence to the format. A proposal will be considered complete if all required sections are present.

All proposals will be evaluated against the desirable criteria listed below.

- A. Demonstrated expertise and capacity to provide the required services (35%)
- B. Recommended approach (35%)
- C. Price (30%)

Only proposals that the ITA has determined meet the mandatory criteria will be evaluated against the desirable criteria.

PROPOSAL FORMAT

Any portions of a proposal which proponents wish to be treated by ITA as proprietary and confidential must be clearly marked as such. *Clarity and brevity are important.* All proponents must provide, at a minimum, the following information:

A. Proposal Cover Page (1 page maximum)

The proposal should include a title page citing the RFP number and the closing date and time

B. Transmittal Letter (1 page maximum)

The transmittal letter must be electronically signed by a person authorized to bind the proponent and must include wording substantively the same as the following:

The enclosed proposal is submitted in response to the above-referenced Request for Proposal. Through submission of this proposal we agree to all of the terms and conditions of the Request for Proposal.

We have carefully read and examined the Request for Proposal and have conducted such other investigations as were prudent and reasonable in preparing the proposal. We agree to be bound by statements and representations made in this proposal and to any agreement resulting from the proposal.

We further acknowledge and agree to the conditions for participating in this procurement as set out in the "Conditions for Participation" section of the Request for Proposal.

C. Table of Contents (1 page maximum)

Include a table of contents with page numbers.

D. Key Features of the Proposal (2 pages maximum)

Proponents should present a concise summary of their submission suitable for review by ITA management.

E. Overview of Proponent (2 pages maximum)

Present a brief description of the company or companies submitting the proposal. In the event that the proponent includes more than one company, briefly describe the

contractual or other arrangements between the companies involved. Please note that one firm **must** be the general contractor with responsibility for all work and work products of all members of the bid team.

F. Qualifications of Personnel (1/2 page maximum per person)

Proponents should summarize the qualifications of the key personnel who will provide services to the ITA consistent with the desirable criteria. Ideally, the ITA is looking to have a single individual act as the prime consultant for the project. Please note this section **must** be limited to qualifications of the persons that the proponent will assign to the project.

G. Demonstrated capacity and expertise to provide the required services (3 pages maximum) Proponents should provide evidence of work or projects they have completed where project objectives and deliverables correspond to the required services.

H. Recommended Approach (4 page maximum) Proponents should detail their preliminary recommendations for each of the required project elements (customer service research and stakeholder engagement research).

I. Budget Estimate (1 page maximum) Proponents should provide a preliminary budget estimate that corresponds with their recommended approach. This should include a budget ceiling for the required research, and if possible, a breakdown by project component. Hourly rates for the project team should be provided if applicable.

J. Risk Management (1 page maximum) Proponent should specify what controls are in place to ensure high quality, timely deliverables or services will be produced within budget.

K. Client References (1 page maximum)

Proponents should provide client references for services / work of a similar nature to that required by the ITA. These references should include:

- Service / Project description;
- Contact name, telephone number, and e-mail address; and
- Dates of provision.

Proponents should conform to this outline, including page limits, when preparing their submissions.

QUESTIONS RELATING TO THE RFP

No pre-proposal bidder's meeting will be held. Proponents may submit questions relating to the RFP to Mia Riback at mrriback@itabc.ca via e-mail within the prescribed timeline. All questions and answers will be shared by posting on BC Bid.

PROCUREMENT SCHEDULE

The following timetable outlines the anticipated schedule for the Request for Proposal and contract process. The timing and the sequence of events resulting from this Request for Proposal may vary and shall ultimately be determined by the ITA.

- | | |
|---|---|
| 1. RFP Released | October 23, 2007 |
| 2. <i>Deadline for Submission of Proposals</i> | <i>November 9, 2007, 2:00 P.M. PDT</i> |
| 3. Proposal Evaluation | November, 13-16 2007 |
| 4. Contract Negotiated / Award | November 19, 2007 |
| 5. Project Initiation | November 26, 2007 |

Please note that the ITA may, at its sole discretion, establish a shortlist of submissions. The ITA may also elect to invite short listed proponents to present their submission and respond to questions from the selection committee. Based on these interviews, the selection committee may adjust ratings of the proposals against the desirable criteria.

PROPOSAL SUBMISSION

Proponents must submit by email one electronic copy (in Word or PDF format) of their proposal on or before 2:00 PM Pacific Standard Time November 9, 2007.

Proposals should be emailed to: mrriback@itabc.ca

The subject line of the email should read: Customer and Stakeholder Research RFP

APPENDIX 1

Administrative Requirements

APPENDIX 1

ADMINISTRATIVE REQUIREMENTS

The following terms will apply to this Request for Proposal and to any subsequent Contract. Submission of a proposal in response to this Request for Proposal indicates acceptance of all the following terms.

Request for Proposal Terminology

Throughout this Request for Proposal, terminology is used as follows:

- “Authority” or “ITA” means the Industry Training Authority;
- “Contract “ means the written agreement resulting from this Request for Proposal executed by the ITA and the Contractor;
- “Contractor” means the successful Proponent to this Request for Proposal who enters into a written Contract with the Authority;
- “Must”, or “mandatory” means a requirement that must be met in order for a proposal to receive consideration;
- “Proponent” means an individual or a company that submits, or intends to submit, a proposal in response to this “Request for Proposal”;
- “Purchasing Commission” means the Purchasing Commission pursuant to the Purchasing Commission Act, RSBC 1996, Chapter 392;
- “Should” or “desirable” means a requirement having a significant degree of importance to the objectives of the Request for Proposal.

Request for Proposal Process

Subsequent Information

All subsequent information regarding this Request for Proposal, including changes made to this document will be posted on the BCBID website at www.bcbid.gov.bc.ca.

Enquiries

All enquiries related to this Request for Proposal are to be directed, in writing and by email, to the following person. Information obtained from any other source is not official and should not be relied upon. Enquiries and responses will be recorded and may be posted on BCBID.

E-mail: **mrback@itabc.ca**

Closing Date

One electronic copy of the proposal in PDF or Word format must be received by 2:00 P.M Pacific Standard Time on November 9th 2007 at: **mrIBack@itabc.ca**

The subject line of the email should read: **Customer and Stakeholder Research RFP**

Late Proposals

Late proposals will not be accepted and will be returned to the Proponent via email.

Eligibility

Proposals will not be evaluated if the Proponent's current or past corporate or other interests may, in the ITA's opinion, give rise to a conflict of interest in connection with this project.

Evaluation Committee

Evaluation of proposals will be by a committee formed by the Authority and may include a representative of the Purchasing Commission or other government agencies.

Evaluation and Selection

The evaluation committee will check proposals against the mandatory criteria. Proposals not meeting all mandatory criteria will be rejected without further consideration. Proposals that do meet all the mandatory criteria will then be assessed and scored against the desirable criteria. The ITA's intent is to enter into a Contract with the Proponent who has the highest overall ranking.

At the Authority's discretion, the ITA may establish a shortlist of submissions. The ITA may further, at its discretion, invite short listed proponents to present their proposals to the selection committee and to respond to questions by the committee. Based on the results of the presentation / interview, the selection committee may adjust the ratings of the short listed proponents.

Negotiation Delay

If a written Contract cannot be negotiated within ten days of notification of the successful Proponent, the ITA may, at its sole discretion at any time thereafter, terminate negotiations with that Proponent and either negotiate a Contract with the next qualified Proponent or choose to terminate the Request for Proposal process and not enter into a Contract with any of the Proponents.

Debriefing

At the conclusion of the Request for Proposal process, all Proponents will be notified. Unsuccessful Proponents may request a debriefing meeting with the ITA.

Proposal Preparation

Signed Proposals

The proposal must be electronically signed by a person authorized to sign on behalf of the Proponent and must bind the Proponent to statements made in response to this Request for Proposal.

Irrevocability of Proposals

By submission of a clear and detailed written notice, the Proponent may amend or withdraw its proposal prior to the closing date and time. Upon closing time, all proposals become irrevocable. By submission of a proposal, the Proponent agrees that should its proposal be successful the Proponent will enter into a Contract with the ITA.

Changes to Proposal Wording

The Proponent will not change the wording of its proposal after closing and no words or comments will be added to the proposal unless requested by the Industry Training Authority for purposes of clarification.

Working Language of the Industry Training Authority

The working language of the Industry Training Authority is English and all responses to this Request for Proposal must be in English.

Proponents' Expenses

Proponents are solely responsible for their own expenses in preparing a proposal and for subsequent negotiations with the Industry Training Authority, if any. If the Industry Training Authority elects to reject all proposals, the Authority will not be liable to any Proponent for any claims, whether for costs or damages incurred by the Proponent in preparing the proposal, loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

Limitation of Damages

Further to the preceding paragraph, the Proponent, by submitting a proposal, agrees that it will not claim damages, for whatever reason, relating to the Contract or in respect of the competitive process, in excess of an amount equivalent to the reasonable costs incurred by the Proponent in preparing its proposal and the Proponent, by submitting a proposal, waives any claim for loss of profits if no agreement is made with the Proponent.

Proposal Validity

Proposals will be open for acceptance for at least 90 days after the closing date.

Firm Pricing

Prices will be firm for the entire Contract period unless this Request for Proposal specifically states otherwise.

Currency and Taxes

Prices quoted are to be:

- in Canadian dollars;
- inclusive of duty, where applicable;
- FOB destination, delivery charges included where applicable; and
- exclusive of Goods and Services Tax.

Completeness of Proposal

By submission of a proposal the Proponent warrants that, if this Request for Proposal is to design, create or provide a system or manage a program, all components required to run the system or manage the program have been identified in the proposal or will be provided by the Contractor at no charge.

Additional Terms

Sub-Contracting

- Using a sub-contractor (who should be clearly identified in the proposal) is acceptable. This includes a joint submission by two Proponents having no formal corporate links. However, in this case, one of these Proponents must be prepared to take overall responsibility for successful performance of the contract and this should be clearly defined in the proposal.
- Sub-contracting to any firm or individual who's current or past corporate or other interests may, in the opinion of the ITA; give rise to a conflict of interest in connection with this project will not be permitted. This includes, but is not limited to, any firm or individual involved in the preparation of this Request for Proposal.
- Where applicable, the names of approved sub-contractors listed in the proposal will be included in the Contract. No additional subcontractors will be added or other changes made, to this list in the Contract without the written consent of the Authority.

Acceptance of Proposals

- This Request for Proposal should not be construed as an agreement to purchase goods or services. The Authority is not bound to enter into a Contract with the Proponent who submits the lowest priced proposal or with any Proponent. Proposals will be assessed in

light of the evaluation criteria. The Authority will be under no obligation to receive further information, whether written or oral, from any Proponent.

- Neither acceptance of a proposal nor execution of a Contract will constitute approval of any activity or development contemplated in any proposal that requires any approval, permit or license pursuant to any federal, provincial, regional district or municipal statute, regulation or by-law.

Definition of Contract

Notice in writing to a Proponent that it has been identified as the successful Proponent and the subsequent full execution of a written Contract will constitute a Contract for the goods or services, and no Proponent will acquire any legal or equitable rights or privileges relative to the goods or services until the occurrence of both such events.

Form of Contract

By submission of a proposal, the Proponent agrees that, should it be identified as the successful Proponent, it is willing to enter into a Contract with the Industry Training Authority in accordance with the terms set out at the end of this Appendix.

Liability for Errors

While the ITA has used considerable efforts to ensure an accurate representation of information in this Request for Proposal, the information contained in this Request for Proposal is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the ITA, nor is it necessarily comprehensive or exhaustive. Nothing in this Request for Proposal is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in this Request for Proposal.

Modification of Terms

The Authority reserves the right to modify the terms of this Request for Proposal at any time at its sole discretion. This includes the right to cancel this Request for Proposal at any time prior to entering into a Contract with the successful Proponent.

Ownership of Proposals

All documents, including proposals, submitted to the ITA become the property of the ITA. They will be received and held in confidence by the Authority, subject to the provisions of the *Freedom of Information and Protection of Privacy Act*.

Use of Request for Proposal

This document, or any portion thereof, may not be used for any purpose other than the submission of proposals.

Confidentiality of Information

Information pertaining to the Industry Training Authority obtained by the Proponent as a result of participation in this project is confidential and must not be disclosed without written authorization from the ITA.

Reciprocity

The Authority may consider and evaluate any proposals from other jurisdictions on the same basis that the government purchasing authorities in those jurisdictions would treat a similar proposal from a British Columbia supplier.