

Appendix D – RFP Particulars

1. The Deliverables

- 1.1. ISI is soliciting for proposals for domestic and international courier services for use by participating members.
- 1.2. Proponents shall be responsible for courier parcels while in its possession, and as a result the Proponent is required to provide track and trace capabilities for any courier shipment that is being processed through its delivery network.
- 1.3. These services include but are not limited to the following shipment categories:
 - 1.3.1. **Standard Shipments**
 - 1.3.1.1. **Standard Type A – Domestic**
 - 1.3.1.2. **Standard Type B – USA**
 - 1.3.1.3. **Standard Type C – International**
 - 1.3.1.4. Regular packages/envelopes/bags that require no special consideration, identification or attention that include the following
 - 1.3.1.4.1. incoming and outgoing
 - 1.3.1.4.2. Next business day (expedited and regular)
 - 1.3.1.4.3. Economical (within 2 business days, or within 3-5 business days)
 - 1.3.2. **Speciality Shipments**
 - 1.3.2.1. **Speciality Type A – Dangerous Goods**
 - 1.3.2.2. Items regulated under the Transport Canada's Transportation of Dangerous Goods Act. Dangerous Goods are defined as articles or substances which are capable of posing a risk to health, safety, property or the environment and which are shown in the list of dangerous goods in The International Air Transport Association (IATA) Dangerous Good Regulations (DGR) or which are classified according to the DGR.
 - 1.3.2.3. **Speciality Type B – Sensitive Shipments**
 - 1.3.2.3.1. Items that may require prior approval, special consideration, identification or attention for both domestic and international, including but not limited to the following:
 - 1.3.2.3.1.1. Biological substances
 - 1.3.2.3.1.2. Live animal (e.g., mice, zebra fish, and insects)
 - 1.3.2.3.1.3. Live plants and flowers
 - 1.3.2.3.1.4. Artwork
 - 1.3.2.4. **Speciality Type B – Dry Ice**
 - 1.3.2.4.1. That may require identification and proper consideration but no prior approval

2. Material Disclosures

2.1. Member institutions:

- 2.1.1. The following is a list of ISI member institutions. Any one institution, any combination, or all of the below may be active participants in the ensuing agreement. Member

institutions may be added, or deleted, as requirements may change throughout the contract period.

- 2.1.1.1.** Acadia University, Wolfville, NS
 - 2.1.1.2.** Atlantic School of Theology, Halifax, NS
 - 2.1.1.3.** Cape Breton University, Sydney, NS
 - 2.1.1.4.** Dalhousie University, Halifax, NS and Faculty of Agriculture, Truro, NS
 - 2.1.1.5.** Holland College, Charlottetown, PEI
 - 2.1.1.6.** Memorial University of Newfoundland, St. John's, NL
 - 2.1.1.7.** Mount Allison University, Sackville, NB
 - 2.1.1.8.** Mount Saint Vincent University, Halifax, NS
 - 2.1.1.9.** NSCAD University, Halifax, NS
 - 2.1.1.10.** Nova Scotia Community College, Various locations throughout NS
 - 2.1.1.11.** Saint Mary's University, Halifax, NS
 - 2.1.1.12.** St. Francis Xavier University, Antigonish, NS
 - 2.1.1.13.** St. Thomas University, Fredericton, NB
 - 2.1.1.14.** Université de Moncton, Moncton, NB
 - 2.1.1.15.** Université Sainte-Anne, Church Point and Halifax, NS
 - 2.1.1.16.** University of Kings College, Halifax, NS
 - 2.1.1.17.** University of New Brunswick, Fredericton and Saint John, NB
 - 2.1.1.18.** University of Prince Edward Island, Charlottetown, PEI
- 2.1.2.** Proponents are required to identify if they are prepared to extend the ensuing agreement to any eligible public-sector entity. Proponents should be prepared to address a cost reduction as a result of the additional volume that could be attained by any additional participants.
- 2.1.2.1.** For the purposes of this section, a public-sector entity means any provincial government or provincially funded entity in Nova Scotia, New Brunswick, Prince Edward Island, and Newfoundland and Labrador, including municipalities, universities, community colleges, school boards, health authorities, housing authorities, agencies, boards, commissions, and crown corporations.

2.2. Quantities

- 2.2.1.** The following annual quantities are based on participating member volume from the previous contract year. These volumes are estimates only for the coming contract year, are no guarantee and do not represent commitment by those members to participate in any contract going forward.

Member	Total 2018 Spend
Acadia University	\$20,321
Atlantic School of Theology	\$7
Cape Breton University	\$15,283
Dalhousie University	\$243,725
Holland College	\$18,233
Interuniversity Services Inc.	\$140
University of Kings College	\$4,431
Mount Allison University	\$70,925
Mount Saint Vincent University	\$19,389
NSCAD University	\$4,816
NSCC	\$13,390
Saint Mary's University	\$70,721
St. Thomas University	\$9,449
St. Francis Xavier University	\$79,666
Universit�e Sainte Anne	\$8,393
Universit�e de Moncton	\$22,160
University of New Brunswick	\$108,830
University of Prince Edward Island	\$119,250
Total	\$829,129

2.3. Volume Usage Reporting:

2.3.1. The Supplier will be responsible for providing volume reports to the Coordinating Entity reflecting the individual transactions of the participating members. These reports should be sent to the Coordinating Entity semi-annually. January 1st through June 30th (inclusive) will be due August 15th and July 1st through December 31st (inclusive) will be due February 15th. The information shall be provided in an Excel format and shall be transmitted electronically. Failure to do so may result in cancellation of the agreement.

2.4. Key Performance Indicators (KPI):

2.4.1. The Supplier will be responsible for providing Key Performance Indicator reports to the Coordinating Entity reflecting the Key Performance measures requested by the Coordinating Entity and agreed to by the Supplier. These reports should be sent to the Coordinating Entity semi-annually. January 1st through June 30th (inclusive) will be due August 15th and July 1st through December 31st (inclusive) will be due February 15th. More frequent reporting may be required during the implementation period or to address a specific performance objective. The failure to provide these reports shall

constitute a substantial failure of performance and may result in the immediate termination of the contract.

2.4.2. At minimum the KPI report should include the following:

2.4.2.1. On time/scheduled pick up rate

2.4.2.2. Timeline to resolve delayed pickups

2.4.2.3. Invoice accuracy

2.4.2.4. Reported number of service issues and the associated timeline in which those issues were resolved

2.4.2.5. Sustainability initiatives

3. Mandatory Submission Requirements

3.1. Submission Form (Appendix B)

3.1.1. Each proposal must include a Submission Form (Appendix B) completed and signed by an authorized representative of the proponent.

3.2. Pricing (Appendix C)

3.2.1. Each proposal must include pricing information that complies with the instructions contained in Pricing (Appendix C).

3.2.2. RFP Particulars (Appendix D)

3.2.2.1. Each proposal must include the proponents Appendix D response to the evaluated criteria.

4. Mandatory Technical Requirements

4.1. Proponents must identify any binding agreements in place with any member for the provision of the deliverables that could impede that member from participating in any agreement that may result from this RFP. For agreements identified proponents must also detail the process for those members to cease that agreement to be eligible to participate in any agreement resulting from this RFP.

4.2. Pre-Conditions of Award

4.2.1. The successful proponent is to outline any modification or addition to the Terms and Conditions contained within Appendix A – Framework Agreement, alterations should be marked on the document.

4.2.2. Successful proponent will submit all legal documents which would require participating members' sign off for review. All other documents need to be binding to the Framework Agreement and any contradictory terms are not permitted.

5. Rated Criteria

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

- 5.2. Proponents may be short listed and invited to participate in an interview to support their ability to meet criteria as set out below.
- 5.3. Proponents should provide the following responses in their proposal clearly noted and separated as follows:

Rated Criteria Category	Weighting (Points)
6.1 Experience and Qualifications 6.2 Corporate Profile	5
6.3 Customer Service 6.4 Communication	10
6.5 Sustainability	2
6.6 Online services /eTool	10
6.7 Implementation and Communication Plan 6.8 Training	8
6.9 Courier services and service areas 6.10 Miscellaneous	10
6.11 Value Add	5
7.0 Evaluated Pricing Criteria	5
Pricing (See Appendix C for details)	45
Total Points	100

Responses should be limited to ten (10) pages in font size ten (10) minimum; any sample reports will be included in page limitation. Responses beyond the page limitation may not be considered.

6. Rated Technical Criteria

6.1. Experience and Qualifications

6.1.1. Each proponent should provide the following in its proposal:

- 6.1.1.1. a brief description of the proponent;
 - 6.1.1.2. a description of its knowledge, skills and experience relevant to the Deliverables;
- 6.1.2. Describe your experience providing courier services to other public sector (MASH) entities of varying size and functionality

- 6.1.3. Proposal to include the information contained in Appendix E Experience and References. This information will be used as references and individuals listed may be contacted to verify performance

6.2. Corporate Profile

- 6.2.1. Detail your corporate qualifications and experience as they relate to the RFP deliverables.
- 6.2.2. Provide a brief description of the company including owners and directors, years in business etc.
- 6.2.3. Define any third-party business partnerships that will be utilized to support this contract. Including call centres, logistics organizations, and service organizations, etc.
- 6.2.4. Describe warehouse and distribution locations specifically in Atlantic Canada.

6.3. Customer Service

- 6.3.1. Provide the roles and responsibilities of the proponents proposed key customer service team representatives (i.e. key contact(s), regional manager and any inside sales support) and any of its agents, employees and sub-contractors who will be involved in providing the Deliverables, together with the identity of those who will be performing those roles and their relevant respective expertise and years experience.
- 6.3.2. Describe the customer service process in place for participating members to make inquiries, resolve issues or escalate concerns clearly demonstrating the capability to communicate clearly and resolve issues in a timely manner. Issues include but not limited to the following:
 - 6.3.2.1. Failure to pick up shipments on time;
 - 6.3.2.2. Failure to deliver shipments as per requested;
 - 6.3.2.3. Failure to provide accurate invoicing;
 - 6.3.2.4. Failure to provide sufficient trainings; and
 - 6.3.2.5. Failure to respond to client requests.
- 6.3.3. Detail your ability to provide services at all levels in both English and French.
- 6.3.4. Describe the contingency plan in the event of staff absence or reduction.
- 6.3.5. Describe how drivers and customer service representatives are qualified and trained. Detail the security processes in place to screen drivers and onsite customer service representatives.

6.4. Communication

- 6.4.1. Identify if there are any confidentiality policies that would be a barrier in sharing shipment information.

6.5. Sustainability

- 6.5.1. Define the active environmental and sustainability programs currently in place within your organization and the specifically those related to the deliverables.

6.6. Online services /eTool

- 6.6.1. Note: A demonstration may be required as a component of the evaluation process.

6.6.2. Describe your proposed online etool available to participating members to perform various courier services activities at no additional charge. Detail its functions and features these should include but not be limited to:

- 6.6.2.1.** online services seven (7) days a week and twenty-four (24) hours per day
- 6.6.2.2.** self-service account registration Schedule a shipment with accurate contract pricing (including any applicable ancillary costs)
- 6.6.2.3.** online validation of Domestic, U.S.A. or International destination addresses
- 6.6.2.4.** Create multi-piece shipments to the same destination address
- 6.6.2.5.** pre-program regularly scheduled pickup time(s) and locations
- 6.6.2.6.** Validate bill-to customer account numbers as part of shipment preparation
- 6.6.2.7.** Send advanced notification through e-mail or messaging to shipment recipients of an upcoming courier delivery
- 6.6.2.8.** Cancel or recall a shipment that is already in transit
- 6.6.2.9.** Create and store shipment destination addresses.
- 6.6.2.10.** Track and trace a shipment
- 6.6.2.11.** Query and determine shipment delivery status
- 6.6.2.12.** online proof of delivery (POD)
- 6.6.2.13.** ordering supplies
- 6.6.2.14.** select payment options

6.7. Implementation and Communication Plan

6.7.1. Outline the proposed implementation to ensue an effective transition from the existing provider to the new Proponent

- 6.7.1.1.** Outline a recommended communication plan to support successful implementation.
- 6.7.1.2.** Outline the timeframe required to set up contract pricing and individual customer account information (note that some participating members may require multiple customer/account numbers).
- 6.7.1.3.** Detail the process for enrolling/setting up new users both at the start of the contract as well as throughout the duration of the contract

6.8. Training

6.8.1. Detail the initial training plan and ongoing training available for members during the Terms of the Agreement. Training should cover basic use of the website, performing searches, ordering, invoicing, credits, etc.

6.9. Courier services and service areas

6.9.1. Clearly detail your ability to service the shipment types below to and from all ISI participating member locations for both overnight (next day) and economical (within 2 business days, or within 3-5 business days). This information should be captured in Appendix D – Part 2 Courier Service Areas questionnaire in Bonfire and can be expanded on in your proposal in this section.

- 6.9.2.** Articulate any restrictions or inability to provide the specified service, to specific ISI participating members locations.
- 6.9.2.1.** An inability to provide all services to all members is not grounds alone for non-compliance however is an evaluated criterion.
- 6.9.3. Shipment types**
- 6.9.3.1. Standard Shipments**
- 6.9.3.1.1. Standard Type A – Domestic**
- 6.9.3.1.2. Standard Type B – USA**
- 6.9.3.1.3. Standard Type C – International**
- 6.9.3.1.4.** Regular packages/envelopes/bags that require no special consideration, identification or attention that include the following
- 6.9.3.1.4.1.** incoming and outgoing
- 6.9.3.1.4.2.** Next business day (expedited and regular)
- 6.9.3.1.4.3.** Economical (within 2 business days, or within 3-5 business days)
- 6.9.3.1.4.4.** Identify maximum overall size (dimensions) and weight for this shipment type.
- 6.9.3.2. Speciality Shipments**
- 6.9.3.2.1. Speciality Type A – Dangerous Goods**
- 6.9.3.2.2.** Detail how proponents will handle safe and secure transport and tracking for items regulated under the Transport Canada's Transportation of Dangerous Goods Act.
- 6.9.3.2.3.** Items regulated under the Transport Canada's Transportation of Dangerous Goods Act. Dangerous Goods are defined as articles or substances which are capable of posing a risk to health, safety, property or the environment and which are shown in the list of dangerous goods in The International Air Transport Association (IATA) Dangerous Good Regulations (DGR) or which are classified according to the DGR.
- 6.9.3.2.4.** Describe the process to set up this type of shipment. Specify the special agreement(s) to be completed by members to ship these items?
- 6.9.3.2.5.** Detail the proponent requirements and certifications that must be in place to allow movement of these items.
- 6.9.3.2.6.** Identify maximum overall size (dimensions) and weight for this shipment type.
- 6.9.3.2.7. Speciality Type B – Sensitive Shipments**
- 6.9.3.2.7.1.** Items that may require prior approval, special consideration, identification or attention for both domestic and international, including but not limited to the following:
- 6.9.3.2.7.1.1.** Biological substances
- 6.9.3.2.7.1.2.** Live animal (e.g., mice, zebra fish, and insects)
- 6.9.3.2.7.1.3.** Live plants and flowers

6.9.3.2.7.1.4. Artwork

6.9.3.2.7.2. Detail how proponents will handle safe and secure transport and tracking for packages containing sensitive items.

6.9.3.2.7.3. Please describe the process to set up this type of shipment. Please specify if there are any special agreement(s) to be completed by members to ship this item?

6.9.3.2.7.4. Identify maximum overall size (dimensions) and weight for this shipment type.

6.9.3.2.8. Speciality Type C – Dry Ice

6.9.3.2.8.1. That may require identification and proper consideration but no prior approval

6.9.3.2.8.2. Detail how proponents will handle safe and secure transport and tracking for packages containing dry ice.

6.9.3.2.8.3. Please describe the process to set up this type of shipment. Please specify if there are any special agreement(s) to be completed by members to ship this item?

6.9.3.2.8.4. Identify maximum overall size (dimensions) and weight for this shipment type.

6.9.4. Remote Areas

6.9.4.1. Detail any remote areas that are not serviced or that are serviced differently than other areas.

6.9.5. International Coverage

6.9.5.1. Indicate any international restrictions or areas that are not serviced.

6.9.6. Third-party Services

6.9.6.1. Identify locations where services are contracted to a third party.

6.9.6.2. Provide the third-party carrier details.

6.9.7. High-Volume Shipping System

Note: A demonstration may be required as a component of the evaluation process.

6.9.7.1. Provide details of the system in place for high volume shipping available to participating members specifically all required software, hardware (computers/printers), database, training, maintenance and technical support (at no additional charge).

6.10. Miscellaneous - Members may require the following service deliverables, please describe the process for each. This information should be captured Appendix D - Part 3 - Miscellaneous Courier Services Bonfire Bid Table and can be expanded on in your proposal in this section if necessary.

6.10.1. Non-Standard Pickups and Deliveries - pick up or delivery outside of normal Business Hours.

6.10.2. Saturday Deliveries - Members may require Proponents to provide courier deliveries on Saturday's.

- 6.10.3. Non-Standard Shipments** - Ability to provide Courier Services to handle odd packages (with respect to non-packaged, overweight / sized, and irregular shaped articles), fragile items, or other items not specified as dangerous goods.
- 6.10.4. Optional Billing Methods** - Ability for Members to use third-party and or collect billing services for Courier Services.
- 6.10.5. Signature Not Required** - For convenience and flexibility, Members may choose to have the Proponent drop courier shipments without receiving a signature from the recipient at no additional charge. Proponents should clearly identify any impacts on operations and or procedures that this would mean.
- 6.10.6. Chain of Signature** - Identify the ability to provide chain of signature services, obtaining signatures throughout the courier shipment route.
- 6.10.7. Known Consignors** - outline what measures have in place to screen and secure air cargo on behalf of the members who do not have the capacity to be registered as “Known Consignors” as part of the Transport Canada’s Air Cargo Security Program which will come into force on October 2016.
- 6.10.8. Delivery Attempt and Return Services** - Indicate the number of delivery attempts, at no additional charge, before considering the courier shipment as undeliverable.
- 6.10.8.1.1.** If a courier shipment is refused by the recipient or consignee, or cannot be delivered for any other reason, detail the process for alternate delivery instructions as well as facilitating return of the undeliverable shipment back to the originator of the shipment, at no additional charge to the Member.
- 6.10.8.1.2.** Provide details as to how returns are handled
Note: no circumstance will ISI participating members be responsible for any extra fees (e.g., warehousing) in instances where shipment is undeliverable, and member is not notified in advance.
- 6.10.9. Hold for Pickup** - Describe your ability for the receiver of a courier shipment to pick up the parcel at a local depot (where it could not be delivered in person), at no additional charge.
- 6.10.10. Notification** - Describe the process for automatic confirmation of delivered shipment via fax, email, phone and/or its website.
- 6.10.11. Packaging Material** - Describe what packaging material is available, at no additional charge to participating member, various Proponent branded packaging materials such as letters, envelopes, packs, pouches and rigid Proponent branded packaging materials such as tubes and boxes.
- 6.10.12. Proof of Delivery (POD)** - Describe the availability for POD for any Courier Service shipment upon completion of final delivery at no additional charge. POD requests should be available using online shipping tools, high-volume shipping systems, through telephone interactive voice response and/or through a live customer service representative.

- 6.10.13. Requesting a Pickup** - Outline the process for Courier Service pickups by using online tools, dedicated high-volume shipping systems, telephone, email and/or fax at no additional charge.
- 6.10.14. Scheduled Pickups** - Detail the ability to schedule Courier Service pickup times, dates and locations.
- 6.10.15. Service Hours** - Provide your service hours. Detail your ability to work with members who may require scheduled package pickup and delivery which are outside of standard Business Hours.
- 6.10.16. Drop Boxes set up** - Detail the ability to provide Drop Boxes for the whole duration of this Agreement upon ISI members' request.
- 6.10.17. Track and Trace** - clearly describe tracking and tracing capabilities in relations to online website tools, high-volume shipping systems, through telephone interactive voice response and / or through a live customer service representative at no additional charge.
- 6.10.18. Email Return Label** – describe the process.
- 6.10.19. Print Return Label** - describe the process

6.11. Value Add

- 6.11.1.** Detail value added options available beyond those requested, any value-added solutions being offered should be clearly identified.

7. Evaluated Pricing Criteria

7.1. Fuel Surcharge

- 7.1.1.** describe how fuel surcharge fluctuations are managed including, but not limited to:

- 7.1.1.1.** The frequency of changes.
- 7.1.1.2.** The process to articulate those changes to customers
- 7.1.1.3.** The public pricing index (including the link to the applicable website) proposed for managing fuel surcharge price changes for the Term of the Agreement(s).
- 7.1.1.4.** How it is reported on reports and invoices.

7.2. Payment Methodology

- 7.2.1.1.** Describe your billing capabilities such as frequency and method as well as acceptable payment while considering the following:

- 7.2.1.1.1.** Electronic capabilities;
- 7.2.1.1.2.** Customizing invoices capability, as requested by members;
- 7.2.1.1.3.** Web page address and email address;
- 7.2.1.1.4.** The ability to accept electronic payments; and
- 7.2.1.1.5.** Ability to process p-card (visa payables) payments