



REQUEST FOR PROPOSAL (RFP)

**Climate Change Adaptation with NPO Partners Project:
Independent Contractor Providing Climate Change Resilience Planning Services
To Non-Profit, Social Services and Community Development Organizations**

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| DATE OF ISSUE: | FEBRUARY 1, 2023 |
| REFERENCE NUMBER: | RPF-25842 |
| PROSPECTIVE BIDDERS REQUIRED TO E-MAIL PHABC TO SIGNAL INTEREST IN SUBMITTING PROPOSAL: | UNTIL FEBRUARY 20, 2023 |
| DEADLINE FOR SUBMITTING QUESTIONS: | FEBRUARY 15, 2023 |
| HOLD FOR POTENTIAL WEBINAR TO ANSWER BIDDERS QUESTIONS—IF NEEDED: | FEBRUARY 21, 2023, 11AM - 12PM PST |
| DEADLINE FOR BID SUBMISSION: | FEBRUARY 28, 2023 |

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1.0 Introduction

The Public Health Association of BC (PHABC) is a voluntary, non-profit, non-government organization, whose mission is to preserve and promote the public's health. The association works toward this mission through its activities in disease and injury prevention, health promotion and protection, and healthy public policy.

This Request for Proposal (RFP) is to invite prospective vendors to submit a proposal to provide **climate change resilience planning services**, on behalf of PHABC, to 8-10 non-profit organizations (hereinafter “NPOs”) that collectively provide social services/community development services in a diversity of BC communities, across the rural, urban, and suburban spectrum (hereinafter “the project” or “this project”). The RFP provides vendors with the relevant operational, performance, and deliverable requirements that the successful bidder must fulfill.

This document describes the Request for Proposal (RPF) from PHABC. This document is a company confidential document. Vendors requested for proposal are engaged to respect the confidentiality of information contained in this document.

Rules for tendering this RFP are explained in section 2.

1.1 Purpose of RFP

PHABC is selecting a solution/service provider for **climate change resilience planning services to NPOs**. Our objective is to select the vendor who most fully meets the requirements identified in this Request for Proposal (RFP). PHABC may elect to award a contract pursuant to the RFP. Your company is invited to take part in this process and provide a proposal that satisfies PHABC’s requirements.

Within the RFP you will find all the information necessary to do a proper assessment of PHABC’s requirements. Service providers are invited to respond to this RFP by describing how they can meet the requirements set out in this RFP and by providing other information requested. Responses to this RFP will be used to qualify service providers for the final evaluation and price negotiation phases of the selection process.

1.2 Scope of Work

OVERVIEW

PHABC is looking for an Independent Contractor or Independent Contractor team (hereinafter “Independent Contractor”) that will provide **climate change resilience planning services** to 8-10 NPOs that collectively provide social services/community development services in a diversity of BC communities, across the rural, urban, and suburban spectrum (hereinafter “the contract” or “this contract”).

Collectively, the NPOs participating in this project operate across a range of budgets and serve a diversity of populations, including those at higher risk of harm from extreme weather events. Examples of the types of services that these organizations provide include: meal delivery, day-time drop-in programming/facilities, mental health and/or substance dependence counseling, violence prevention and support, social services navigation, housing/shelter, and home-based support services. We expect that all NPOs involved in this project provide a direct service to people.

This project is delivered through a partnership between: Public Health Association of BC, Vantage Point, and Vancouver Coastal Health.

CONTEXT

Community-based, non-profit, social services and community development organizations can complement the emergency management efforts of government agencies and contribute to more effective emergency preparedness and response at a community-wide level. NPOs can also be a vital part of long-range work to build community resilience to climate change.

Working in conjunction with government agencies that provide social and/or community services, NPOs can contribute to reducing health-related impacts of extreme weather events by:

- ✓ Continuing to operate and offer their services during extreme weather events;
- ✓ Reaching and/or providing outreach to marginalized (identifying and/or equity-denied) community members, particularly those at higher risk of weather-driven mortality and morbidity, to share safety information or coordinate support for isolated individuals;
- ✓ Operating physical spaces that are culturally safe, accessible, and dependable during extreme weather event--and that complement the programs and facilities of government agencies.
- ✓ Contributing to systemic changes that will mitigate the negative impacts of extreme weather events, and reduce the need for emergency response.

There is an opportunity to accelerate climate change adaptation and resilience in the non-profit, social services and community development sector. To this end, in 2023, PHABC is looking to hire an Independent Contractor to provide high-quality, climate resilience planning services to a cohort of up to 10 NPOs.



DELIVERABLES

Specifically, PHABC is looking for an Independent Contractor (or Independent Contractor team) to deliver the following outputs, under this contract:

- **A culturally-safe, evidence-informed methodology (hereinafter, “the methodology”)** that:
 - ✓ Assesses a NPO’s susceptibility to and preparedness for extreme weather events;
 - ✓ Guides the development of an action plan to increase and/or optimize the NPO’s climate change resilience and capacity to effectively contribute to community climate change emergency management; and,
 - ✓ Provides a capital and operating cost estimate of the revenue needed to implement the action plan developed above.

- **8-10 “climate resilience action plans,” one for each of the 8-10 NPOs involved in this project,** and that would be developed through application of the methodology.

- **8-10 “business cases” or “cases for support,” one for each of the 8-10 NPOs involved in this project,** and that clearly communicate the opportunity to invest in the implementation of each of the NPOs’ climate change resilience action plans.

We envision that the NPOs’ “climate change resilience action plans” will largely be internal documents that guide an organization’s planning, operations, and management in relation to the impacts of climate change.

The NPOs’ business cases or “cases for support”, on the other hand, will “repackage” some of the content of the climate change resilience action plans into external-facing documents that compellingly communicate the opportunity to invest in the implementation of the NPOs climate change resilience action plans—and that can be used for communications with donors, government agencies, etc.

INTENT

PHABC expects that the outputs generated by this contract will provide “building blocks” for parallel sector-building activities that will take place outside of the scope of this contract. In particular, PHABC partners such as Vantage Point will collate the data and knowledge generated by this contract into sector-building tools and resources. Example of these may include: a sector-wide “business case” and other tools to communicate the important role of NPOs in promoting community climate resilience; policy and program recommendations for various government agencies; a repository of templates, success stories, and/or case studies for NPOs. In other words: it is expected that this contract will generate a foundation of data, knowledge and outputs that can be used by PHABC and other partner organizations to extend the project’s reach and impact, sector-wide.



PHABC is expecting that, upon completion of this contract, the outputs of this contract will result in the following outcomes:

- 8-10 NPOs have increased capacity to operate during climate change emergencies and to contribute to community-wide climate change emergency preparedness and response.
- PHABC partners, such as Vantage Point, collate the data and knowledge generated by this planning project into a business case that articulates, in detail, the importance of NPOs' role in this work and the opportunity to further invest in the capacity of social services/community development NPOs to contribute to community climate change emergency preparedness and response.

DRAFT OUTLINE FOR THE “CLIMATE CHANGE RESILIENCE ACTION PLANS” THAT PHABC WOULD LIKE THE INDEPENDENT CONTRACTOR TO PRODUCE IN PARTNERSHIP WITH THE 8-10 NPOs PARTICIPATING IN THIS PROJECT

- a. A description of the organization, their organizational structure, human resources, the community services it provides, and the people it serves, including statistics re: number of people directly and indirectly served, if available. *NOTE:* this information will be provided to the Independent Contractor by PHABC.
- b. An overview of the climate-related hazards that affect the organization's operating area, including historical and future considerations *NOTE:* a comprehensive climate risk assessment is *not* required.
- c. A description of how the organization is currently 1) prepared for and, 2) susceptible to extreme weather events/what are the threats to business continuity. This should include:
 - An inventory of the assets and/or services the organization can offer during extreme weather events. *NOTE:* a first draft of this information will be provided to the Independent Contractor by PHABC.
 - An inventory of local community's/peer organizations' assets and/or services that the organization can tap into for climate change emergency preparedness and response. *NOTE:* a first draft of this information will be provided to the Independent Contractor by PHABC.
- d. An inventory of resource gaps (equipment, facilities, human resources, organizational policies/structures, partnerships, etc.) that the organization would need to fill, in order to:
 - ✓ Be optimally prepared for extreme weather events;
 - ✓ Offer key services during extreme weather events; and,
 - ✓ Contribute to community climate-related emergency preparedness.



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- e. An inventory and description of other gaps/limitations/challenges the organization will need to acknowledge or consider as part of their climate change emergency preparedness plans (e.g. accessibility or outreach limitations that may explain why some people are unlikely to attend programming offered by the organization and be isolated).
 - f. A list of actions the organization needs to take—prior to extreme weather events, and during actual events—in order to be able to offer key community services during extreme weather events **and** contribute to community emergency management. Actions should be prioritized, and/or organized chronologically/in a timeline, and should include implementation considerations (e.g. feasibility, challenges).
 - g. A sample “operations calendar” outlining annual actions and activities the organization would need to take to be prepared for extreme weather events.
 - h. A budget specifying the estimated capital and operating costs associated with: implementation of the actions and activities identified under *section f.*, above; and, addressing of the gaps identified under *sections d. and e.*, above.
 - i. A budget that identifies: available revenue to cover the above costs, and/or planned/projected revenue and sources of revenue; as well as revenue or funding gaps.
 - j. A list of the partnership and resources that would be required to effectively implement the organization’s climate change resilience action plan.
 - k. A description of how the emergency management assets and actions that would be deployed by the organization, as per this climate change resilience action plan, would complement or supplement and/or add value to the emergency management efforts of local governments in which the organization operates, as well as HEMBC, EMBC, and other govt agencies’ emergency management efforts.

ASSUMPTIONS

PHABC or PHABC project partners will provide the Independent Contractor with the following information:

- Names, addresses, and contacts for the 8-10 NPOs the Independent Contractor is expected to provide climate resilience planning services to, under this contract.
- A description of each of the NPOs, their organizational structure, human resources, the community services they provide, the locations they operate their services in, and the people they serve (including statistics re: number of people directly and indirectly served, if available).
- A draft inventory of the assets and/or services each of the 8-10 NPOs can offer during extreme weather events.
- A draft inventory of local community’s/peer organizations’ assets and/or services that the organization can tap into for climate change emergency preparedness and response.



PHABC assumes that there is likely going to be overlap in content across the 8-10 organizations' climate resilience action plans and related business case/cases for support to be developed under this contract by the Independent Contractor. This should create “economies of scale” and budget efficiencies for the Independent Contractor delivering these outputs.

While the Independent Contractor will provide climate resilience planning services to NPOs that are located in different geographic regions of BC, PHABC does *not* expect project budget to be spent on travel costs. PHABC assumes that most, preferably all, of the work proposed by the Independent Contractor can be delivered virtually, digitally and by phone.

The Independent Contractor will be expected to share project outputs and updates with PHABC's project partners (such as: Vantage Point and Vancouver Coastal Health), throughout the duration of this contract. The Independent Contractor will also be expected to attend 1-3 meetings with PHABC's project partners to discuss potential formats for the Project's outputs—in order to facilitate efficient uptake of Project outputs by PHABC and partner organizations, and to facilitate efficient follow-up on the Project by PHABC and partner organizations.

Moreover, the Independent Contractor will be expected to respond to inquiries by the project partners and/or by external stakeholders regarding the project under this contract.

TIMELINES

PHABC expects that:

- The Independent Contractor will begin work under this contract no later than **Monday, April 24, 2023**.
- There will likely be a Project launch meeting with PHABC staff and PHABC project partners, on Wednesday, **April 26, from 1:30-3:00 PM Pacific**.
- **By Thursday, June 29, 2023**, the Independent Contractor will deliver a first set of climate resilience action plans for each of 3-4 NPOs involved in this project and that operate in locations susceptible to extreme heat and wildfire smoke.
- **By October 1, 2023**, the Independent Contractor will deliver a second set of climate resilience action plans for an additional 3 NPOs involved in this project.
- **By December 15, 2023**, the Independent Contractor will deliver all 8-10 climate resilience action plans and related business cases/cases for support, for each of 8-10 NPOs involved in this project and that operate in locations susceptible to extreme heat and wildfire smoke.



INDEPENDENT CONTRACTOR’S QUALIFICATIONS:

The ideal Independent Contractor (or Independent Contractor team) for this project has experience and/or expertise with the following:

- Non-profit management, business planning, ops planning—with preference given to prospective independent contractors that have this type of experience with social services and/or community development organizations.
- Development of business cases and/or “cases for support.”
- Community development, and knowledge of barriers facing involvement for marginalized (or equity-denied) community members.
- Working with, and/or in: small, medium, and large non-profit organizations; and, in a diversity of communities across the rural-urban spectrum.
- Understanding of general issues facing the NPO sector.
- Reconciliation, cultural humility, and cultural safety knowledge, and familiarity with Indigenous nations in VCH region.
- Climate change emergency preparedness and response planning, at the organizational level.
- Climate change emergency preparedness and response planning, at the community level.
- Climate change adaptation planning at the organizational level.

1.3 Confidentiality

This Request for Proposal, and any other material and information provided by PHABC, may contain proprietary and confidential information that is provided to you for your exclusive use in evaluating and preparing your response. If at any time your company decides not to respond to the RFP, please destroy any copies of the document and confirm your non-participation either in writing or by email.

This document should not be duplicated except as necessary to prepare your response. This document should not be disclosed or distributed to any third party. All copies of this document except one file copy should be destroyed following submission of your response. The file copy should be held confidential and not used for any purpose other than bid evaluation, response preparation, and subsequent discussions with PHABC, if any result. You should safeguard the confidentiality of this document and any copies with the same degree of care with which you safeguard your own confidential information.



Vendors may not use the name, logo, or trademarks of PHABC in connection with any advertising or publicity materials or activities without the prior written consent of PHABC. The obligation not to disclose any confidential information shall not be affected by bankruptcy, receivership, assignment, attachment or seizure procedures, whether initiated by or against the vendor, nor by the rejection of any agreement between the PHABC and the vendor, by a trustee of the vendor in bankruptcy, or by the vendor as a debtor-in-possession or the equivalent of any of the foregoing under local law.

2.0 Vendor Instructions

2.1 Background

This RFP has been made available to organizations that will respond satisfactorily to the Request for Proposals (RFP) dated **February 1, 2023**. The RFP identifies PHABC's requirements in sufficient detail in order to identify a preferred vendor.

2.2 General Instructions

Vendors are requested to consider the following when preparing their responses:

- Vendors that intend to submit a proposal, are encouraged to send a very short and quick email to: admin@phabc.org indicating their interest in submitting a proposal—this will make it possible for PHABC to contact interested Vendors with any updates or additional information pertaining to this Request for Proposals, should this instance arise.
- Vendor responses must be valid for 6 months from the date of submission.
- Vendors must be commercially bound to their response.
- Vendors must address all matters raised in this RFP.
- Any statements made about the performance and specifications of the proposed solution will be considered to be true and be incorporated into the final contract.
- Any functionality or features not included in the cost estimate must be clearly identified in the response to the RFP.
- Vendors must address all items specified in this RFP. Failure to adhere to the specified format may disqualify a vendor from further consideration.

Submission of proposals shall constitute evidence that the vendor has made all the above-mentioned examinations, and is free of any uncertainty with respect to conditions that would affect the execution, and completion of this project.

2.3 RFP Changes, Binding Bid Process

PHABC reserves the right to negotiate any or all RFP terms and conditions, and to cancel, amend or resubmit this RFP in part or entirety at any time. This RFP has been issued exclusively for providing adequate information about this project requirements for PHABC in order to receive a proposal of this project from vendors. While one or more vendors may be selected as candidates, and PHABC may negotiate a vendor contract with one or more



respondents, PHABC reserves the right to reject any or all of the responses received for any reason or no reason, and to decline negotiating and signing a vendor contract with any vendors responding to the RFP regardless of whether any vendor's response is partially or fully accepted or rejected, or contains the highest or lowest mark-up or price, or the most timely services delivery commitment, or whether a vendor responds with a no-response notice or has an existing contract with PHABC, and regardless of any other matter.

PHABC further reserves the right to negotiate with any vendor who does not receive this RFP. Accordingly, responses should be submitted in the terms most favorable to PHABC. PHABC will consider vendor responses as binding offers by vendors.

2.4 Disqualification

Statements known to be, or subsequently found to be, inaccurate or misleading may disqualify the vendor from further participation in the evaluation process.

2.5 Structure of the Response

PHABC will be accepting proposals for this project, until **February 28, 2023**.

While PHABC is not putting a limit on proposals' length, we respectfully ask that bidders consider submitting proposals of reasonable length, to be respectful of reviewers' time and capacity.

Preferred proposals content:

- A description of how the proponent meets the qualifications described in this RFP.
- Examples of work that speak to the proponent's qualifications and relevant experience.
- 3 References.
- Independent Contractor's resume (or team members' resumes).
- Proposed scope of work, workplan, deliverables, and timelines.
- Proposed project team composition, roles, and level of involvement of each team member i.e. proportion of total project workplan that is allocated to each team member, and/or estimated n. of hours of involvement by each team member. This also applies to teams of 1.
- Proposed project management approach (Please illustrate your project management approach in terms of proposed: project communications, escalation management, risk management, quality plan, and any other relevant information).
- Proposed budget, or budget options, including any graphic treatment for business cases.
- Independent Contractor's fees and/or hourly rate (or team members' rates).
- Any project limitations, assumptions, risks or other considerations the Independent Contractor deem important to flag to PHABC regarding: this project, and/or the Independent Contractor's proposed workplan, timelines, and budget.



2.6 Schedule of Events

| Event | Date |
|--|--|
| Date of RFP issue | February 1, 2023 |
| Questions submitted by vendors about scope or approach due | February 15, 2023 |
| Responses to questions submitted by vendors about scope or approach due | February 20, 2023 |
| PLACEHOLDER DATE for anonymous webinar to answer vendors questions/clarify project scope of work—if needed | February 21, 2023 11AM-12PM PST |
| Proposal due date | February 28, 2023 |
| Proposal Review Process (Month of) | March 2023 |
| Vendor selection & notification | March 24, 2023 |
| Anticipated commencement date of work | April 24, 2023 |
| Anticipated completion of work date | January 24, 2024 |

2.7 Contacts

Any questions concerning technical specifications or Statement of Work (SOW) or contractual terms & conditions must be directed to:

| | |
|-----------------|--|
| NAME | Lovey Dhesi |
| POSITION | Administrative Coordinator |
| PHONE | 250-595-8422 |
| EMAIL | admin@phabc.org |

Responses to the RFP are due by February 28, 2023 Please submit your response in PDF format to:

| | |
|---------------------------|--|
| NAME | Christina Lavoie |
| POSITION | Operations Manager |
| PHONE | 250-589-1589 |
| EMAIL | ops.manager@phabc.org |
| EMAIL SUBJECT LINE | RE: RFP-25842 BID SUBMISSION |

2.8 Evaluation Criteria

Any award to be made pursuant to this RFP will be based upon the proposal with appropriate consideration given to operational, technical, cost, and management requirements.

Evaluation of offers will be based upon the Vendor’s responsiveness to the RFP and the total price quoted for all items covered by the RFP.

Proposals must address all the items identified in the Request. All proposals will be evaluated based on the following criteria:



Public Health Association of British Columbia

Request for Proposal – Climate Change Adaptation with NPO Partners

RPF-25842

www.phabc.org

| CRITERIA | POINTS |
|--|------------|
| Independent Contractor’s (or Independent Contractor team’s) qualifications; i.e. experience with/expertise in: | |
| <ul style="list-style-type: none"> ▪ Non-profit management, business planning, ops planning—with preference given to prospective Independent Contractors that have this type of experience with social services and/or community development organizations. | 10 |
| <ul style="list-style-type: none"> ▪ Development of business cases and/or “cases for support.” | 10 |
| <ul style="list-style-type: none"> ▪ Community development, and knowledge of barriers facing involvement for marginalized or equity-denied community members. | 10 |
| <ul style="list-style-type: none"> ▪ Working with, and/or in: small, medium, and large non-profit organizations; and, in a diversity of communities across the rural-urban spectrum. | 10 |
| <ul style="list-style-type: none"> ▪ Understanding of general issues facing the NPO sector. | 5 |
| <ul style="list-style-type: none"> ▪ Reconciliation, cultural humility, cultural safety knowledge, and familiarity with Indigenous nations in BC. | 10 |
| <ul style="list-style-type: none"> ▪ Climate change emergency preparedness and response planning, at the organizational level. | 14 |
| <ul style="list-style-type: none"> ▪ Climate change emergency preparedness and response planning, at the community level. | 14 |
| <ul style="list-style-type: none"> ▪ Climate change adaptation planning at the organizational level. | 14 |
| Proposed scope of work, workplan and timelines , illustrating the proponent has understood PHABC’s requirements for this contract and outlining how the proponent intends to achieve the deliverables. | 10 |
| Proposed project team composition, roles, and level of involvement of each team member. | 8 |
| Proposed project management approach. | 5 |
| Proposed budget. | 10 |
| Independent Contractor’s fees and hourly rates. | 10 |
| Feasibility and potential of the proposed workplan, timelines and budget, in light of any limitations, risks, assumptions or considerations flagged by the proponent. | 10 |
| The proponent’s analysis of their proposed approach’s: potential limitations, assumptions, risks, or other considerations. | 10 |
| TOTAL | 160 |

PHABC does not represent that these are the sole criteria and reserves the right to adjust selection criteria at any time. In case the top-scoring proposal(s) exceeds the PHABC budget available for this project, PHABC reserves the right to contact shortlisted proponents to explore potential workplan and budget modifications, and/or other arrangements that could render the proponent’s proposed approach feasible within available funds.

2.9 Awarding of Contract

PHABC is not bound to accept the lowest proposal and is not obliged to give a reason for rejecting a proposal. Prospective suppliers are advised that nothing in this documentation, or in any communication between PHABC and any other party, shall be taken as constituting a contract, agreement or representation between PHABC and/or any other party, except for a formal award of contract made in writing by PHABC. Neither shall it, or they, be taken as constituting a contract, agreement or representation that a contract shall be offered.

Please note that PHABC reserves the right to vary the number of vendors invited to interviews and presentations, or dispense completely with this part of the process, at its sole discretion. PHABC reserves the right at all points in the procurement process either not to select a candidate to go forward to the next stage, or following completion of the procurement process, not to make any award of contract.

The Public Health Association endeavours to ensure all submitted requests are treated objectively and fairly. PHABC reserves the right to accept, reject or ask for clarification of any or all requests in order to ensure the interests of the association, its funders, and partners.

PHABC has prepared this RFP in good faith. To the extent that PHABC is permitted by law, PHABC excludes any liability (whether in contract, negligence or otherwise) for any incorrect or misleading information contained in this RFP.

3.0 Vendor Eligibility Criteria

Vendor is defined as an independent company, sole proprietor, non-profit organization or charity registered in Canada. Please provide the following details:

- Legal Name:
- Office Address:
- Number of Employees:
- In what business area has your company engaged?
- How many years has your company been in business under its present name?
- If you are a corporation or limited liability corporation, please provide proof of date of incorporation.
- If you are a non-profit or charitable organization, please provide certificate of society of incorporation under the societies act, or charitable business number.
- Is there, or has there been in the last three years, any litigation or governmental or regulatory action pending or threatened against your organization that might affect your ability to provide stated products and services? State the status of any current or pending lawsuits.



The business enterprise, non-profit organizations, or charities must currently be incorporated, or registered as a company (corporation, limited, partnership, charity) and be able to demonstrate that it has been and is offering goods/services under the business name for a period not less than 2 years. Sole Proprietors/Independent Contractors must be able to demonstrate that they have been engaged in their business activity for not less than 2 years. This requirement may be waived, at the discretion of the contract adjudication panel—if a proponent’s proposal indicates strong fit of the bidder with the project’s requirements and desired experience/qualifications.

We have a strong commitment and preference to the consideration and use of certified minority and women-owned businesses (M/WBE’s) to the greatest extent possible. Bidder shall provide details, if applicable.

The eligibility will be seen based on the all of the above criteria and PHABC has the right to reject responses not meeting the qualification criteria.

4.0 Pricing Details

All prices quoted by the vendor must be fully itemized, in Canadian Dollars, and inclusive of all taxes and all expenses. PHABC expects to contract with the vendor on a Fixed Price basis for all components within the Scope of Work. We expect the vendor to quote a fixed price for:

- Each deliverable and project phase
- Resource wage allocation per project phase and deliverable
- All software licenses for the vendor’s products
- All software licenses for third party products supplied by the Vendor

Please clearly identify all assumptions made when producing these prices and clearly outline any services that are not included in the budget.