



# Request for proposals: Methods of academic assessment for non-CEAB applicants for licensure

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Date issued: March 1, 2021

Interest disclosure and Bidder meeting deadline: March 5, 2021

Proposal submission deadline: March 19, 2021

Questions concerning this RFP should be directed to:

Ryan Melsom  
Manager, Qualifications and CEQB Secretary  
[Ryan.Melsom@engineerscanada.ca](mailto:Ryan.Melsom@engineerscanada.ca)  
613-801-6241

# 1 Table of contents

1	Table of contents .....	2
2	Statement of purpose .....	3
3	Background information .....	3
3.1	Engineers Canada background.....	3
3.2	Background on the Canadian Engineering Qualifications Board (CEQB) and subcommittees .....	4
3.3	Background on the academic assessment of non-CEAB applicants for licensure .....	4
4	Deliverables and project timeline .....	5
5	RFP submission & evaluation process.....	7
5.1	Submission schedule .....	7
5.2	Bidder meetings .....	8
5.3	Inquiries .....	8
5.4	Proposal evaluation .....	8
5.4.1	Evaluation Process .....	8
5.4.2	Mandatory Requirements.....	9
5.4.3	Scoring.....	9
5.4.4	Scoring Legend .....	10
5.4.5	Proposal evaluation .....	10
5.4.6	Confidentiality.....	11
6	RFP terms and conditions .....	11
6.1	Process conditions .....	11
6.2	Competitive process .....	12
6.3	Proposal revisions .....	12
6.4	Cost of preparing proposals.....	12
6.5	Clarification of proposal.....	12
6.6	Acceptance of RFP conditions.....	13
6.7	Notification of success .....	13
6.8	Negotiation delay.....	13
6.9	Reservation of rights .....	13
6.10	Limitation of damage .....	13
6.11	Proposal Documents.....	13

## 2 Statement of purpose

The Canadian Engineering Qualifications Board (“CEQB”) of Engineers Canada is seeking proposals from firms or individual consultants (“Bidders”) who will conduct a feasibility study exploring methods of academic assessment for potential engineering licensees who have not obtained their education through an accredited Canadian engineering program (or one that is considered substantially equivalent by the Canadian Engineering Accreditation Board (“CEAB”)) (the “Project”). The Project will be conducted through a phased, consultation-based approach, with an anticipated completion date of October 2023.

Successful completion of this Project will entail several key deliverables, developed with the support of the CEQB Secretariat and in consultation with Project stakeholders, including a CEQB task force:

- An environmental scan of methods of academic assessment currently in use by Canadian and key international engineering regulators, as well as other Canadian professional regulatory bodies;
- A national workshop to solicit perspectives and expertise of subject matter experts in the area of engineering academic assessment;
- A general direction document, based on information solicited at the workshop and through research, that will be used for consultation with key stakeholders; and
- An in-depth study report, based on the finalized general direction, that provides an overview of potential methods for assessing non-CEAB applicants for licensure, and outlines the strengths and weaknesses of each in terms of legal considerations, regulatory constraints, psychometric validity, cost and effectiveness of implementation, etc.

## 3 Background information

### 3.1 Engineers Canada background

Engineers Canada upholds the honour, integrity, and interests of the engineering profession by supporting consistent high standards in the regulation of engineering, encouraging the growth of the profession in Canada, and inspiring public confidence. For over 80 years, we have worked on behalf of the provincial and territorial engineering regulators that regulate engineering practice and license the country’s 300,000 members of the engineering profession.

Our work is focussed on ten (10) core purposes, as established by Engineers Canada’s members, the engineering regulators:

1. Accrediting undergraduate engineering programs.
2. Facilitating and fostering working relationships between and among the regulators.
3. Providing services and tools that enable the assessment of engineering qualifications, foster excellence in engineering practice and regulation, and facilitate mobility of practitioners within Canada.

4. Offering national programs.
5. Advocating to the federal government.
6. Actively monitoring, researching, and advising on changes and advances that impact the Canadian regulatory environment and the engineering profession.
7. Managing risks and opportunities associated with mobility of work and practitioners internationally.
8. Fostering recognition of the value and contribution of the profession to society and sparking interest in the next generation of professionals.
9. Promoting diversity and inclusivity in the profession that reflects Canadian society.
10. Protecting any word(s), mark, design, slogan, or logo, or any literary, or other work, as the case may be, pertaining to the engineering profession or to its objects.

### **3.2 Background on the Canadian Engineering Qualifications Board (CEQB) and subcommittees**

The CEQB develops national guidelines, Engineers Canada papers, examination syllabi, and other products as mandated by the Engineers Canada Board. CEQB deliverables serve the needs of Canada's engineering regulators, engineering licence holders, and applicants for licensure by enabling the assessment of engineering qualifications, fostering excellence in engineering practice and regulation, and facilitating mobility.

Several sub-committees assist the CEQB in its work. Each is chaired by a CEQB member and consists of volunteers and staff from the provincial and territorial engineering regulators. At the discretion of the CEQB, and as required by its annual workplans, the CEQB also strikes task forces as needed.

In January 2021, to guide the Project outlined in this RFP, the CEQB struck a Task Force on Alternative Methods of Academic Assessments for Non-CEAB Applicants (hereinafter the "**task force**"). The task force is to be chaired by a CEQB member, and will be comprised of three (3) additional CEQB members, one (1) representative from the Canadian Engineering Accreditation Board, and four (4) regulator representatives with expertise in academic assessment. Its purpose is to provide expert advice throughout the development of this Project, and to approve documents for subsequent CEQB approval and regulator consultations.

### **3.3 Background on the academic assessment of non-CEAB applicants for licensure**

In Canada, students who graduate from an undergraduate engineering program accredited by the Canadian Engineering Accreditation Board are considered to have met the academic requirement for licensure with any one of Canada's twelve provincial and territorial engineering regulators. Engineers Canada also holds mutual recognition agreements with several other countries which allow for certain non-CEAB applicants to apply for Canadian licensure.

For several years, Canada’s engineering regulators have collectively expressed a need for greater clarity on the best method for assessing the academic credentials of applicants for licensure who have **not** attained their education through either a CEAB-accredited or CEAB-recognized program (hereinafter, “**non-CEAB applicants**”). Recent court cases have illustrated that there are potentially significant risks involved with assessing applicants using methods that are not defensible as transparent, objective, impartial, and fair, because of the potentially life-changing nature of the assessment.

To mitigate this risk, in 2019 the Board of Engineers Canada had proposed that the CEQB undertake a feasibility study on a national academic exam. However, in the process of consulting with Canadian engineering regulators on this proposal, it became clear that several regulators have already developed alternative systems of academic assessment. Thus, the initial scope of the proposal was expanded to include multiple alternative methods of academic assessment (including those used internationally) and to consider their feasibility in the Canadian engineering regulation context.

The significant amount of time and resources that several regulators have invested into their own systems for academic assessment mean that there are substantial political and regulatory complexities associated with this study. A robust, meaningful consultation process, guided by [Engineers Canada Board policy 9.2](#), will be a critical factor to the successful delivery of the study and will guide and define deliverables. Another key factor that will drive the project’s success is the ability of the Bidder to work well with a volunteer task force who will advise throughout the Project’s duration.

## 4 Deliverables and project timeline

The successful Bidder (the “**Consultant**”) will be required to develop and deliver several major pieces of work, with the guidance and support of the CEQB Secretariat and in consultation with key stakeholders, including a CEQB task force (see section 3.2).

1. **With the support of the CEQB Secretariat, conduct an environmental scan of methods of academic assessment currently in use by Canadian and international engineering regulators, as well as other Canadian professional regulatory bodies. (May 2021)**

In preparation for the subsequent work in this Project, the Consultant will be required to conduct an environmental scan which outlines relevant systems for academic assessment for licensure that are either in use or proposed. Information gained through this scan will be highly valuable to all subsequent deliverables.

The **intended outcome** of the environmental scan is to provide study participants with a broad understanding of methods of academic assessment and their application in professional regulatory contexts.

The **deliverable** is the environmental scan.

**2. Prepare and deliver a day-long national workshop to gain regulator and stakeholder perspectives on methods of academic assessment for non-CEAB applicants. (May/June 2021)**

It is policy of the Engineers Canada Board that the outputs of the CEQB involve a substantial input and consultation process with Canada's twelve engineering regulators and, as needed, key stakeholders. A national workshop in the early-stages of CEQB projects ensures the smooth development of CEQB documents as they proceed through later stages.

The **intended outcome** is to gather critical information required for the successful development of the general direction document (and, by extension, the final deliverable).

The **deliverable** is a workshop.

**3. Write a draft general direction document based on research and the workshop outcomes, outlining the feasibility study's topics and direction. (September/October 2021)**

The Consultant will use information gathered from the national workshop to develop a draft general direction document, which is sent to engineering regulators for consultation. The CEQB Secretariat provides guidance and support during the development of the draft general direction, including meetings with the project task force, and subsequently executes the consultation. Following consultation, the consultant will receive summarized stakeholder feedback and use this to finalize the general direction.

The **intended outcome** of the draft general direction is to provide a document that the CEQB Secretariat will use to confirm the project's overall direction with key stakeholders.

The **deliverable** is the draft general direction.

**4. Finalize the general direction document using collated feedback from the consultation process. (January/February 2022)**

Following consultation on the draft general direction, the task force, in collaboration with the Consultant, will respond to the summarized stakeholder feedback. The Consultant will use this collated feedback and responses to finalize the general direction document. The CEQB Secretariat may revise the general direction as needed for CEQB approval.

The **intended outcome** of the finalized general direction document is to establish consensus about what the study will contain.

The **deliverable** is the finalized general direction.

## **5. Draft the feasibility study, based on the approved general direction document. (August 2022)**

After CEQB approval of the general direction, the Consultant will commence work on the feasibility study itself, soliciting the input of the task force as needed throughout the development process. The study will be developed in alignment with the general direction and will provide an overview of potential methods for assessing non-CEAB applicants for licensure, outlining the strengths and weaknesses of each in terms of legal considerations, regulatory constraints, cost and effectiveness of implementation, psychometric validity, and other significant considerations, to be identified through the previous deliverables. The task force will provide final approval of the document for consultation.

The **intended outcome** of the draft feasibility study is to provide a document that the CEQB Secretariat will use to solicit any further input needed to finalize the feasibility study.

The **deliverable** is the draft feasibility study.

## **6. Incorporate feedback from the draft feasibility study consultation, and finalize the feasibility study for CEQB and subsequent Engineers Canada Board approval. (March 2023)**

Upon receiving the feedback on the draft feasibility study, the Consultant will incorporate comments and revise the document, with input and support from the task force. A further round of consultation and revision may be required following this, depending on the document's reception by regulators. Depending on the scope of such revisions, they may be completed by the CEQB Secretariat. The task force will approve the final feasibility study for subsequent CEQB and Engineers Canada Board approval.

The **intended outcome** of the feasibility study document is to provide an Engineers Canada Board-approved overview of methods of academic assessment, which can be used by Engineering Regulators when making decisions about their assessment methods.

The **deliverable** is the approval-ready draft feasibility study.

# **5 RFP submission & evaluation process**

## **5.1 Submission schedule**

The following is a list of key dates from Request for Proposal (RFP) issuance through to Notice of Award. The dates are subject to change by Engineers Canada, at its sole discretion.

No.	Description	Key Dates
1	Issue RFP	March 1, 2021
2	Interest disclosure and Bidder meeting request deadline	March 5, 2021
3	Bidder meetings (see section 5.2)	March 10-12, 2021
4	Proposal Submission Deadline	16:00 EST on March 19, 2021
5	Evaluation of proposals, including reference checks	March 19-April 2, 2021
6	Notice of Award issued (subject to negotiation of Service Agreement)	April 2, 2021

## 5.2 Bidder meetings

There will be an opportunity for prospective Bidders to meet individually with Engineers Canada staff to express interest in the Project and to participate in a brief question-and-answer session between March 10-12, 2021. While these meetings are not mandatory, they provide an opportunity for Bidders and Engineers Canada staff to meet prior to proposal submission. If you wish to participate, please contact the person identified in section 5.3 (Inquiries) to schedule a meeting. Bidders are requested to limit meeting participants to two (2) people per Bidder entity.

Questions must be submitted twenty-four (24) hours prior to a Bidder meeting. Questions raised at the Bidders meeting will be collated and distributed to all Bidders who have expressed interest in submitting a proposal.

## 5.3 Inquiries

Questions concerning this RFP or the Bidders meeting may be directed by email to Ryan Melsom, Manager, Qualifications and CEQB Secretary at [Ryan.Melsom@engineerscanada.ca](mailto:Ryan.Melsom@engineerscanada.ca).

## 5.4 Proposal evaluation

### 5.4.1 Evaluation Process

Upon the closing of the Proposal Submission Deadline, Engineers Canada will evaluate proposals in accordance with the following process:

#### Stage 1: Initial Assessment

All proposals received by Engineers Canada will initially be assessed by the CEQB Secretariat (or their delegates) and any other individuals(s) that are deemed necessary.



The assessment of each proposal will be based on the contents of the Bidders' written proposal and any statements provided in writing, if needed, in response to requests for clarification made by Engineers Canada. Staff will ensure compliance with the stated mandatory requirements and will score each proposal, in accordance with section 5.4.4 (Scoring Legend).

## **Stage 2: Interviews and Reference Checks**

Following staff's initial assessment of the proposals, the 1-2 highest scoring Bidders will be contacted to conduct interviews and further confirm their ability and fit to provide the required services and deliverables. The references of the top-scoring Bidders may also be contacted at this stage.

Once this assessment is complete, Engineers Canada will proceed to select and notify the successful Bidder, by issuing a Notice of Award.

### **5.4.2 Mandatory Requirements**

Engineers Canada has several requirements that are deemed mandatory when submitting a response to this RFP. The following criteria have been identified as mandatory:

- Proposals must be received prior to the Proposal Submission Deadline;
- Proposals must indicate that the Bidder is able to deliver the services and complete the Project within the stated timelines;
- Proposals must include the information requested in section 5.4.5 (Proposal Evaluation) of this RFP; and
- Proposals must clearly state the total Project cost, including all fees and expenses, in Canadian funds.

Proposals which fail, in the sole discretion of Engineers Canada, to meet any mandatory requirement will be eliminated from further consideration in the evaluation process. However, Engineers Canada reserves the right to waive any mandatory requirements if it deems fit and appropriate to meet the interests of and provide best value to Engineers Canada. This clause should be interpreted solely for the benefit of Engineers Canada and not for the benefit of the Bidders.

### **5.4.3 Scoring**

Proposals will be evaluated and scored by Engineers Canada, using predetermined criteria to determine which proposal potentially provides the best value. Scoring of proposals and evaluation comments are confidential and will not be disclosed.

In terms of relative importance, each criterion is given a pre-assigned weight, as outlined in section 5.4.5 (Proposal Evaluation), by which each proposal will be evaluated. Each criterion is rated on a scale of 0 to 10 (see section 5.4.4, Scoring Legend, below). Each criterion's rating is then multiplied by the assigned weight to yield a total for that element. Summation of the individual totals yields a total score, which represents the overall degree of satisfaction for the respective submission.

#### 5.4.4 Scoring Legend

0 Points Deficient	1-3 Points Poor	4-6 Points Fair	7-8 Points Good	9-10 Points Excellent
The proposal fails to meet the requirements of the applicable scoring criteria in a suitable and documented manner.	The proposal fails to meet the requirements of the applicable scoring criteria in a suitable and documented manner.	The proposal barely meets the requirements of the applicable scoring criteria in a suitable and documented manner.	The proposal reasonably demonstrates that the requirements of the applicable scoring criteria are met in a documented and suitable manner.	The proposal fully demonstrates that the requirements of the applicable scoring criteria are met in a documented and suitable manner.
The proposal fails to demonstrate that the Project will be performed in an acceptable manner.	The proposal reveals significant weaknesses that could result in unacceptable shortcomings in performance of the Project.	The proposal reveals weaknesses that could result in tolerable or reasonably correctable shortcomings in performance of the Project.	The proposal reveals minor weaknesses that should not significantly impact performance of the Project.	There are no apparent weaknesses.

#### 5.4.5 Proposal evaluation

The proposals will be evaluated as follows:

No.	Scoring Criteria	Weight	Points	Total Points
1	Mandatory requirements (section 5.4.2)		Elimination	
2	Qualifications and relevant experience	50		
3	Approach and methodology	30		
4	Fees and expenses	15		
5	Quality of submission	5		
	<b>Total</b>	100		

To confirm the above criteria, Bidders must include with their proposal, at a minimum, the following supporting information:

##### Qualifications and relevant experience:

- Detail your experience working on projects related to foreign credential assessment (esp. academic), as it pertains to the issue of professional licensure;
- Detail your experience working on issues surrounding the Canadian professional regulatory environment and explain your understanding of challenges associated with this area (e.g. interprovincial differences, mobility issues, human rights legislation, Canadian fairness legislation, federal immigration programs);

- Describe your knowledge of academic assessment tools used both within Canada and within broader international contexts (ideally, as they pertain to engineering);
- Detail your experience with stakeholder engagement and facilitation, including both individual expertise of proposed resources and applied knowledge of relevant methodologies;
- Detail your expertise in psychometrics.

#### **Approach and methodology:**

- Describe how you will approach the Project;
- Describe your understanding of the Project requirements and deliverables;
- Describe the process you would follow to develop the national workshop, identified as the second deliverable in section 4 (Deliverables and Project Timeline).
- Identify the expected challenges for this Project and the proposed mitigation strategies;
- Provide a detailed work plan, with timelines.

#### **Fees and expenses:**

- Outline your proposed costs and fees.

In addition to the above, Bidders must supply the name, email address, and phone number of two (2) recent clients (within the past 24 months) who have received services similar to those requested in this RFP and who may be contacted as references. Include a short description of the work performed, including how it was similar to this Project.

Engineers Canada will communicate with the winning Bidder throughout this Project in English. All proposals must therefore be submitted in English.

#### **5.4.6 Confidentiality**

Proposals and information submitted by Bidders will be treated as proprietary, held confidential, and used only for evaluating the ability of the Bidder to handle the Project. The details of any proposals will be shared only with the persons involved in the Project evaluation process.

## **6 RFP terms and conditions**

### **6.1 Process conditions**

This RFP is not an offer by Engineers Canada to any person, and no contract of any kind whatsoever (including, without limitation, no “Contract A”) is formed between Engineers Canada and any Bidder upon the submission of a proposal in response to it. For greater certainty, nothing in this RFP, including without limitation, the use of mandatory language, language reserving rights to Engineers Canada, or other language that might, but for this clause, be indicative of contractual intention, is intended by Engineers Canada to indicate an intention to be contractually bound to any Bidder in any manner whatsoever. Engineers Canada retains the right, in its absolute discretion, to consider and analyze the proposals, negotiate with any Bidder at any time, select a preferred Bidder, or enter a service contract

with a Bidder. Without limiting the foregoing, since this clause precludes Contract A, none of the usual Contract A terms apply, and Engineers Canada may:

- Reject or accept any proposal, whether or not complete, and whether or not it contains all the required information;
- Require clarification of any proposal;
- Request additional information on any proposal;
- Reject any or all proposals without any obligation, or any compensation or reimbursement to the Bidders;
- Refuse to enter into a service contract with any of the Bidders;
- Re-advertise for new submissions, or call for tenders for this work or for work of a similar nature.

Engineers Canada may, in its sole discretion, independently verify any information in any proposal. The proposals submitted by Bidders must be offers made in good faith, and Engineers Canada reserves the right to make a choice from the various proposals, or not choose any. Engineers Canada shall not be obligated in any manner until a written agreement relating to an approved proposal has been duly executed.

## **6.2 Competitive process**

With the issuance of this RFP, Engineers Canada is making a business opportunity available to Bidders having the experience, competence, and managerial sophistication to enter into a service contract to complete the work.

## **6.3 Proposal revisions**

All proposal revisions must be received by Engineers Canada prior to the RFP submission/closing date and time stated in Section 5 (RFP submission & evaluation process), above.

## **6.4 Cost of preparing proposals**

Bidders are solely responsible for all costs they incur in preparing and submitting proposals.

## **6.5 Clarification of proposal**

Engineers Canada reserves the right, but does not have an obligation, to request clarification of a proposal or request further information from any or all Bidders. In addition, if, in the opinion of Engineers Canada, any proposal contains a minor defect or irregularity or fails in some way to comply with any requirement of the RFP in a way that, in the opinion of Engineers Canada can be remedied without providing an unfair advantage to one or more Bidders, the Engineers Canada Contact Person may request rectification from the Bidder(s).

Engineers Canada, upon receipt of appropriate clarification and/or rectification, may waive the minor defect or irregularity and accept the proposal. Failure by a Bidder to provide a written response that, in the opinion of Engineers Canada, properly clarifies or rectifies its proposal, within the time specified in the request for clarification or rectification, may result in disqualification of the proposal.

## **6.6 Acceptance of RFP conditions**

Receipt of a proposal by Engineers Canada will be considered acceptance by the Bidder of the RFP terms and conditions, and will be incorporated in the Bidder's proposal.

## **6.7 Notification of success**

A written Notice of Award shall be the only valid form of notification of success in response to this RFP.

## **6.8 Negotiation delay**

If a written agreement cannot be concluded within fifteen (15) business days of notification to the designated Bidder, Engineers Canada may, in its sole discretion, terminate negotiations with that Bidder and either negotiate a service agreement with another Bidder of its choice or choose to terminate the RFP process and not enter into a contract with any of the Bidders.

## **6.9 Reservation of rights**

Engineers Canada reserves the right, in its sole discretion, to:

- modify, cancel or suspend the selection process, or any or all stages of the selection process, including before or after provision of a Notice of Award, at any time for any reason;
- accept or reject any proposal based on the evaluation criteria in section 5, above, as determined in the sole discretion of Engineers Canada;
- not accept any proposal; and
- reject or disqualify all or any proposal without any obligation, compensation, or reimbursement to any Bidder.

## **6.10 Limitation of damage**

Each Bidder, by submitting a proposal, agrees that:

- In the event any or all proposals are rejected or disqualified, or the Project or selection process is modified, suspended or cancelled for any reason, neither Engineers Canada, nor its employees, agents, officers, or directors will be liable under any circumstances for any claim, or to reimburse or compensate any person in any manner whatsoever, including but not limited to costs of preparation of the proposal, loss of anticipated profits, loss of opportunity, or for any other matter; and
- The Bidder waives any claim for loss of profits or loss of opportunity if : (i) the Bidder is rejected or disqualified or is not successful in the selection process; (ii) the selection process for the project is suspended, cancelled or modified at any time; or (iii) cancellation occurs per the above.

## **6.11 Proposal Documents**

All documents submitted by Bidders will become the property of Engineers Canada.