



**REQUEST FOR PROPOSALS (RFP)**  
**Mobility Register Management Solution**  
DATE ISSUED: September 7, 2021

Interest Disclosure Deadline: September 21, 2021

Proposal Submission Deadline: October 19, 2021

Questions concerning this RFP should be directed to:

Beryl Strawczynski  
Manager, Regulatory Research and International Mobility  
[Beryl.Strawczynski@engineerscanada.ca](mailto:Beryl.Strawczynski@engineerscanada.ca)  
Engineers Canada  
300-55 Metcalfe Street  
Ottawa, ON K1P 6L5

## 1. Table of Contents

1. Table of Contents .....	2
2. Statement of Purpose.....	4
3. Background information .....	5
3.1. Engineers Canada Background .....	5
3.2. Background on the Engineers Canada Mobility Register.....	5
3.3. Business problems.....	6
3.4. Technology Strategy Requirements .....	7
3.5. Expected benefits.....	8
4. RFP Terminology.....	9
5. Scope of Work and Key Deliverables .....	10
5.1. Cloud computing solution.....	10
5.2. Requirements Management Plan .....	10
5.3. Maintenance and Enhancement Roadmap .....	11
5.4. User Training Program.....	11
5.5. Implementation Consultation Services .....	12
5.6. Additional services .....	12
6. RFP Submission and Assessment Process.....	13
6.1. RFP schedule.....	13
6.2. Interest disclosure and inquiries .....	13
6.3. How to submit a proposal.....	13
6.4. Required proposal content.....	14
6.5. Review Team .....	14
6.6. Assessment Process.....	14
6.6.1. Stage 1 – Evaluation of Mandatory Requirements.....	14
6.6.2. Stage 2 - Evaluation of Qualified Bidders' RFP Responses – Project needs.....	15
6.6.3. Stage 3 – Evaluation of Bidder interviews.....	15
6.6.4. Stage 4 – Reference checks .....	15
6.6.5. Notice of Award.....	15
6.7. Scoring .....	15
6.8. Proposal Evaluation .....	17
6.9. Confidentiality.....	17
7. RFP Terms and Conditions.....	18
7.1. Process Conditions .....	18
7.2. Competitive Process .....	18
7.3. Proposal Revisions .....	18
7.4. Cost of Preparing Proposals.....	19
7.5. Clarification of Proposal .....	19

7.6. Acceptance of RFP Conditions ..... 19

7.7. Notification of Success ..... 19

7.8. Negotiation delay..... 19

7.9. Reservation of Rights..... 19

7.10. Limitation of Damage ..... 20

7.11. Proposal Documents..... 20

## 2. Statement of Purpose

Engineers Canada is seeking proposals from entities (“**Bidders**”) with the capacity to develop a new cloud-based platform (the “**Solution**”) to facilitate registrations on the Engineers Canada Mobility Register (the “**Project**”). The Project will be conducted through a phased, consultation-based approach, with an anticipated completion date of December 31, 2022.

Successful completion of this Project will entail several key services and deliverables, including:

- A cloud computing solution that includes data from existing systems;
- A requirements management plan that documents and confirms business analyses, processes and tools to be used during the Project, including how communications with the Engineers Canada Project team (the “**Project team**”) and changes to the Solution or Project priorities will be handled during the Project’s duration;
- A maintenance and enhancement roadmap of the technology platform for the next three (3) to seven (7) years;
- A User training program that provides for on-demand and other User-centric methods for ensuring Users have the knowledge to operate the system;
- Implementation consultation services to the Project team with respect to technical deployment; and
- Any other optional value-added services that Bidders feel may contribute to the success of the Project.

### 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 associations that regulate engineering practice and license the country's 300,000 members of the engineering profession.

Our work is focussed on 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.

More information about Engineers Canada can be found on our website at [www.engineerscanada.ca](http://www.engineerscanada.ca).

#### 3.2. Background on the Engineers Canada Mobility Register

The Engineers Canada Mobility Register grants qualified engineers designations (e.g. "IntPE (Canada)" and "APEC Engineer") that signify they are part of an exclusive group of professionals who meet a high standard of competence and who are prepared to conduct engineering practices internationally. In many cases, engineers with the IntPE (Canada) and APEC Engineer designations may experience faster registration in some international jurisdictions. The system operates on a self-assessment process whereby Canadian professional engineers declare that they meet and will maintain the qualifications to be on the Mobility Register.

The following is current background information related to the Mobility Register that is relevant to the Project:

- There is no existing Mobility Register management solution;
- Existing processes support both English and French applications and Engineers Canada communicates with applicants in the official language of their choice;
- Applicant information is collected using a webform and document attachments;
- Files are maintained in a secure SharePoint library within Engineers Canada's information technology infrastructure;

- Although not currently used, with the implementation of a new Solution Engineers Canada will create a dedicated application review team comprised of engineering regulator admissions staff to consider applicants' documentation and make decisions about registration status;
- Engineers Canada communicates with the various provincial/territorial engineering regulators to confirm applicants' licensing status via email; and
- Queries about the Mobility Register (e.g. number of applicants per year, number of current registrants, discipline of registration) are tallied manually or using basic Excel functions.

In line with the above, the Solution will be required to support the following estimated number of Users:

User Type	Year 1	Year 2	Year 3	Year 5	Year 10
Engineers Canada staff	3	3	3	3	3
Engineering regulator admissions staff^	30	30	30	30	30
New applicants *	150	180	240	300	360
Existing applicants *	400	550	730	1000	1300

\* These are projections of application volumes based on current rates.

^ Some of the engineering regulator admissions staff will also be part of the newly created application review team.

The Solution will also be required to support the following estimated number of activities per year:

Activity	Year 1	Year 2	Year 3	Year 5	Year 10
Logins	600	800	1000	2000	3000
New application uploads/imports	150	180	240	300	360
Decisions from the application review team	150	180	240	300	360
Validations with regulators	150	180	240	300	360
Issuing certificates	150	180	240	300	360
Annual renewal declarations	550	750	1000	1300	2000

### 3.3. Business Problems

The following table lists the primary business challenges to be improved by the Project:

ID	Business Problems
BP-01	<b>Document management and repository</b> <ul style="list-style-type: none"> <li>• Information about applicants is received in a phased approach throughout the process from different sources and must be collected, tracked, and amalgamated manually.</li> <li>• There is no central repository where all information about an applicant is securely located, making it more time-intensive and error-prone for Engineers Canada staff to access, update, and manage.</li> </ul>

ID	Business Problems
	<ul style="list-style-type: none"> <li>• There is no self-service function for applicants/registrants. Applicants have no visibility to their application once it is submitted. Similarly, registrants cannot access a copy of their certificate if they lose or misplace it. Applicants/registrants express confusion about where and how they can access details about their application/certificate and must contact Engineers Canada for help. Engineers Canada staff must consequently spend time responding to queries and updating the records manually.</li> <li>• The above issues will be exacerbated as the volume of applications continues to grow.</li> </ul>
BP-02	<b>Process management</b> <ul style="list-style-type: none"> <li>• Engineers Canada staff collect information, draft correspondence, prepare templates, and respond to requests manually. It is a time-intensive and error-prone process to complete these tasks and to track the progress of applications.</li> <li>• Engineers Canada is responsible for maintaining the accuracy of applicant/registrants' contact information. Engineers Canada staff spends a lot of effort keeping files updated.</li> <li>• Overall, every activity in the Mobility Register process is manually completed by applicants, Engineers Canada staff, or the provincial/territorial engineering regulators. There are no automated advances after completing each phase, and no automatic notifications to the parties about requirements or status updates.</li> </ul>
BP-03	<b>Quality control</b> <ul style="list-style-type: none"> <li>• Due to the manual process, there is limited quality control at every step of the application process: applicants can submit incomplete information and Engineers Canada staff must apply great attention to detail to manage applicants' personal information appropriately when preparing correspondence, templates, or handling web data.</li> </ul>
BP-04	<b>Data queries</b> <ul style="list-style-type: none"> <li>• Queries about the Mobility Register are tallied using basic functions in Excel and/or counted manually.</li> <li>• The type of queries is limited to very specific requests that must exactly match existing criteria for how the data is currently collected and stored. There is no ability to re-organize the data to facilitate different types of queries.</li> <li>• The limited availability of statistical data is problematic for informing program operations.</li> </ul>

### 3.4. Technology Strategy Requirements

Engineers Canada's strategic technological direction is towards PaaS and SaaS services. Therefore, to fit within Engineers Canada's technological strategy, any proposed solution must be either a PaaS or a SaaS solution. Further, the Solution must reside in a cloud infrastructure provider (e.g., AWS or Azure) with sufficient means to guarantee stability, durability, and uptime of the solution. Any third-party solution that is integral to the proposed Solution must demonstrate adequate cloud infrastructure provisions.

No solution will be considered that involves custom builds stood up on Engineers Canada's onPrem infrastructure, or IaaS solutions that require Engineers Canada to maintain/upgrade/patch the solution's elements (OS, database servers, etc.), as this stands outside of Engineers Canada's technological direction.

Details of the proposed cloud infrastructure setup must be agreed upon and understood by Engineers Canada's technical team. The Solution will be tenant-owned and operated by Engineers Canada.

It is expected that any certificates, keys, or passwords created to log in to the cloud infrastructure (e.g. SSH keys, resource passwords, etc.) would be transferred to Engineers Canada, and would updates to any artifact(s) required to access resources.

### 3.5. Expected Benefits

The following table lists the primary business challenges to be improved by the Project:

ID	Description
EB-01	<b>Document management and repository</b> <ul style="list-style-type: none"> <li>• Improved collection, storage, and management of data related to the Mobility Register. Having the data for applicants/registrants in one repository would facilitate Engineers Canada staff's ability to access, update, and manage it in keeping with Engineers Canada's Privacy Policy to ensure safe handling of all personal information.</li> <li>• Improved data accuracy and reduced staff time spent collecting and verifying data from multiple locations.</li> <li>• Reduced risk of transcription errors or data breach/loss from records mismanagement.</li> </ul>
EB-02	<b>Improved process management and quality control</b> <ul style="list-style-type: none"> <li>• Procedures are performed within the Solution (instead of by email, on SharePoint, etc.). Some tasks should be automated/scheduled to reduce dependence on manual completion. This will reduce Engineers Canada staff's time spent on these tasks and the risk of errors in completing them.</li> <li>• Manual tasks would no longer need to be monitored and completed before starting the next step in the application process, meaning that completion of procedures would be expedited.</li> </ul>
EB-03	<b>Improved user experience</b> <ul style="list-style-type: none"> <li>• Applicants/registrants will have more self-service options to track the status of their files and manage their personal information without having to contact Engineers Canada staff.</li> <li>• This provides more visibility and ownership to the applicant/registrant and reduces the time and effort required by Engineers Canada staff to maintain records and respond to related inquiries.</li> </ul>
EB-04	<b>Improved service evaluation</b> <ul style="list-style-type: none"> <li>• Improved ability to conduct statistical queries, including an increase in the type of queries and confidence in the data reported.</li> <li>• This information will help inform service measurements and improvements.</li> </ul>



## 4. RFP Terminology

- **Cloud computing:** A delivery model for computing resources in which various servers, applications, data, and other resources are integrated and provided as a service over the Internet.
- **Cloud computing solution / the Solution:** The proposed cloud computing delivery model marketed by the Bidder, including configuration and/or customization that will meet or exceed all the requirements specified in the RFP.
- **Configuration:** Any change, enhancement to the cloud computing model that does not require source code changes completed by the Bidder to provide the specific functionality.
- **Customization:** Any change or enhancement to the cloud computing model requiring source code changes completed by the Bidder to provide the specified functionality.
- **High-risk issues or bugs:** Anything that comprises Solution security, data integrity and data durability, and core Solution functionality.
- **IaaS:** Infrastructure as a service
- **Mandatory requirements:** Requirements that must be met to receive consideration.
- **PaaS:** Platform as a service
- **SaaS:** Software as a service
- **User:** Any person making use of the cloud computing Solution.
- **User Acceptance Testing (UAT):** The last phase of the software testing process that verifies whether a product or software is fit for the purpose it was built for.

## 5. Scope of Work and Key Deliverables

As stated in Section 2 (Statement of Purpose), this Project will entail several key services and deliverables, including:

### 5.1. Cloud Computing Solution

Working directly with the Project team, the successful Bidder will deliver a cloud computing Solution (which can be accessed in both French and English) that includes required data either converted or migrated from the existing Mobility Register system. The data stored in the cloud Solution must reside exclusively in Canada.

#### **Deliverable(s):**

- A recognized or demonstrably suitable cloud computing Solution that resides exclusively in Canada and meets the Project needs, as set out in Section 2.2 of Appendix “A” – Bidder Response Package;
- A recognized or demonstrably suitable test environment for the cloud computing Solution in addition to a technical test plan;
- Technical system documentation; and
- User system documentation (which is to be separate from User training).

#### **Success Measures/Indicators:**

- The Solution is adaptable to changes in the Mobility Register program (“adaptability” as defined by Engineers Canada at its sole discretion);
- No high-risk issues or bugs (“high-risk” as defined in Section 4 (RFP Terminology));
- Completion of data conversion / migration that meets requirements as agreed to by the Project team;
- Passing UAT as determined by Engineers Canada, at its sole discretion;
- Completion of User and Support Training (see section 5.4 (User Training Program)); and
- Compliance with Engineers Canada’s Information Technology architectural requirements.

### 5.2. Requirements Management Plan

Working directly with the Project team, the successful Bidder will prepare and follow a requirements management plan and schedule that documents and confirms the business analyses, processes and tools to be used, and how communications with the Project team and solution capabilities or project priorities will be handled during the Project’s duration.

#### **Deliverable(s):**

- A sufficiently detailed requirements management plan and schedule that includes key milestones and sub-tasks broken down into one-week durations;
- Documented processes, tools, and business analyses to support the Solution’s development;
- A documented approach for handling change requirements, including decisions to prioritize requirements and communicate with the Project team in a timely and effective manner;
- An assigned resource to be the central point of contact accountable for any deliverables and/or activities contained in the Project plan; and
- Bi-weekly status reports outlining:

- Overall summarization of the Project progress;
- Deliverables achieved;
- Deliverables remaining, progress, and expected delivery on each;
- Status of the Project budget; and,
- Issues and concerns affecting specific deliverables, the Project schedule, the Project budget, or any other aspect of the Project.

**Success Measures/Indicators:**

- Changes to requirements are addressed within existing Project timelines and budgets.

### **5.3. Maintenance and Enhancement Roadmap**

Considering the needs of the Project and the medium-term and longer-term needs of Engineers Canada, the successful Bidder will define a cloud computing release approach and implementation roadmap demonstrating when and how the ongoing needs of Engineers Canada will be considered and delivered.

**Deliverable:**

- Roadmap for the maintenance of the Solution for the next three (3) to seven (7) years, including:
  - Monitoring of the Solution and the responding of alerts and failures, and
  - Upgrades to the Solution.

**Success measure/indicator:**

- There is a maintenance plan for the cloud computing Solution.

### **5.4. User Training Program**

Working directly with the Project team, the successful Bidder will develop and deliver a training program that provides for on-demand training and other User-centric methods for ensuring Users have the knowledge to operate the Solution. This includes but is not limited to readiness of Engineers Canada staff to train Users on an ongoing basis. The training program should take place at Engineers Canada's head office (in Ottawa, Ontario) and include the possibility of ongoing online training.

Different Users and training requirements include:

- Engineers Canada staff will have broad front-end and back-end User requirements that will require a thorough training program;
- Engineering regulator admission staff and the new application review team will have specific back-end User requirements that Engineers Canada staff should be able to offer through a train-the-trainer program; and
- Applicants will have specific front-end User requirements that will require contextual help functions to facilitate self-service.

**Deliverable(s):**

- Development and delivery of a "User Training Program";
- Development and delivery of a "Train the Trainer Program"; and
- Contextual Help features for applicants.

**Success Measure/Indicator:**

- Users of the Solution report that the training program(s) are well understood, including that Users have the knowledge to successfully operate and use the Solution; and
- User Training Program and Contextual Help functions are offered in both French and English languages.

## 5.5. Implementation Consultation Services

The successful Bidder will provide consultation services to the Project team with respect to technical deployment approaches and tactics.

**Deliverable(s):**

- Deployment recommendation that considers Project-specific risks and implementation approach(es);
- Deployment approach that ensures User acceptance;
- Assistance with the Solution deployment where required; and
- Recommended approach and technical plan for ongoing maintenance and future deployments.

**Success Measure/Indicator:**

- Successful deployment of the solution.

## 5.6. Additional Services

Bidders may, at their discretion, suggest other optional value-added services or scope items that they believe will contribute to success of this Project.

## 6. RFP Submission and Assessment Process

### 6.1. RFP Schedule

The following is a list of key dates from RFP issuance through to Notice of Award. The dates are subject to change by Engineers Canada, in its sole discretion.

No.	Description	Key Dates
1	Issuance of RFP	September 7, 2021
2	Interest Disclosure Deadline	September 21, 2021
5	Proposal Submission Deadline	October 19, 2021
6	Evaluation of proposals – Stages 1 and 2	Completed by October 29, 2021
7	Bidder interviews	November 22-30, 2021
8	Evaluation of proposals – Stages 3 and 4	Completed by December 10, 2021
9	Notice of Award issued (subject to negotiation of a service agreement)	December 17, 2021

### 6.2. Interest Disclosure and Inquiries

To be considered, Bidders must indicate their interest in submitting a proposal, by email, to Beryl Strawczynski (the “**RFP Contact Person**”) at [Beryl.Strawczynski@engineerscanada.ca](mailto:Beryl.Strawczynski@engineerscanada.ca). Interest must be disclosed by September 21, 2021 at 11:59pm EDT (the “**Interest Disclosure Deadline**”).

Thereafter, Bidders with questions concerning this RFP are invited to submit their questions via email to the RFP Contact Person. Responses to questions that are relevant to all Bidders (e.g. clarifying questions regarding the RFP process, solution requirements, current Mobility Register process, etc.) will be made available to all Bidders through postings on the Engineers Canada and MERX websites. **It is requested that all Bidder questions be received no later than October 1, 2021.**

### 6.3. How to Submit a Proposal

Proposals must be submitted electronically, by email, no later than October 19, 2021 at 11:59pm EDT (the “**Proposal Submission Deadline**”) to the RFP Contact Person at:

Beryl Strawczynski  
Manager, Regulatory Research and International Mobility  
Engineers Canada  
[Beryl.Strawczynski@engineerscanada.ca](mailto:Beryl.Strawczynski@engineerscanada.ca)

Confirmation of receipt will be sent to Bidders by reply email.

## 6.4. Required Proposal Content

Proposals must include a covering letter and the information requested in Sections 1 and 2 of Appendix “A” – Bidder Response Package.

## 6.5. Review Team

Proposals will be evaluated by a review team (the “**Review Team**”) comprised of Engineers Canada staff. This may include the Executive Vice-President, Regulatory Affairs, the Manager, Regulatory Research and International Mobility, and the Manager, Operational Infrastructure and may include any other individual(s) as necessary, at Engineers Canada’s sole discretion.

## 6.6. Assessment Process

### 6.6.1. Stage 1 – Evaluation of Mandatory Requirements

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

- Interest disclosure must be received before the Interest Disclosure Deadline;
- 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; and,
- Proposals must be complete and include the information requested in Sections 1 and 2 of Appendix “A” – Bidder Response Package, including stating the total Project cost, with all fees and expenses in Canadian funds (Section 2.4 of Appendix “A” (Cost Information)).

Accordingly, Bidders are asked to respond to this RFP by completing the Bidders Response Package in Appendix “A”. As a first step, the information and responses provided in Section 1 of Appendix “A” (Mandatory Requirements) will be reviewed by the Review Team (the “**Initial Assessment**”).

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.

More specifically, Bidders who answer “Yes” to each of the questions posed in Section 1.2 of Appendix “A” (Mandatory Project Requirements) and who are shown to be **viable partners\***, taking into consideration responses provided in the Due Diligence Questionnaire (Section 1.3 of Appendix “A” (Bidder Viability – Due Diligence Questionnaire (DDQ))), shall be deemed “**Qualified Bidders**” and will move on to Stage 2 of the RFP process.

**\*Viable partners** refer to Bidders who are able to demonstrate, to Engineers Canada’s satisfaction, that they would, if selected, be financially stable, and legally and ethically sound. The Review Team will take into consideration all comments, mitigating

circumstances and explanatory notes provided by the Bidder in connection with its responses.

#### **6.6.2. Stage 2 - Evaluation of Qualified Bidders' RFP Responses – Project needs**

The Review Team will score the proposals of Qualified Bidders (provided in response to each question in Section 2 of Appendix “A” (Project Needs)) applying the scoring set out in Section 6.7 (Scoring) to the criteria defined in Section 6.8 (Proposal Evaluation) and will award an overall score with respect to each Qualified Bidder.

Information provided in Section 2.4 of Appendix “A” (Cost Information) will be used to inform the Review Team of Bidder’s anticipated budget and costs associated with the Project. Bidders who provide the lowest costing information will not necessarily be the successful Bidder.

At Engineers Canada’s sole discretion, the 2-4 top-scoring Qualified Bidders from Stage 2 (the “**Short-Listed Bidders**”) will be invited to participate in Bidder interviews.

#### **6.6.3. Stage 3 – Evaluation of Bidder interviews**

The Short-Listed Bidders will receive an invitation to participate in an interview with the members of the Review Team. Short-Listed Bidders will have two weeks to prepare a presentation/demonstration of the proposed solution, as well as to describe how they will be able to provide the requested services and deliverables, as described in Section 5 (Scope of Work and Key Deliverables) of this RFP. The presentation/demonstration should, at a minimum, include:

- A visual representation of the User interface or examples of what the User interface might look like; and,
- An explanation of how the Solution will meet privacy and security needs.

The Review Team should be provided the opportunity to ask questions related to usability and technical alignment of the proposed Solution as well as questions to confirm the Bidders’ stated skills, experience and ability to provide the requested services and deliverables. The Review Team will assess and score the interview in accordance with the criteria defined in Section 6.8 (Proposal Evaluation).

#### **6.6.4. Stage 4 – Reference checks**

Engineers Canada will complete reference checks for the top-scoring Bidder(s).

#### **6.6.5. Notice of Award**

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

### **6.7. Scoring**

Proposals (including the Bidder responses within Section 2 of Appendix “A”, the Short-Listed Bidder interviews and reference checks) will be evaluated and scored by the Review Team, 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 6.8 (Proposal Evaluation), by which each proposal will be evaluated. Each criterion is rated on a scale of 0 to 10 (see 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.

#### Scoring Legend

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



## 6.8. Proposal Evaluation

Proposals will be evaluated based on the combined results of the following stages:

Stage		Description	Weight	Points	Total Points
1.	Bidder response package review	<b>Assessment of Mandatory Requirements</b> <ul style="list-style-type: none"> <li>Review of responses to Sections 1.2 and 1.3 of Appendix "A" – Bidder Response Package</li> </ul>	<b>Elimination</b>		
2.		<b>Assessment of Qualified Bidders' RFP Responses – Project needs</b>	50%		/5
		<ul style="list-style-type: none"> <li>Confidence in the ability to provide the requested services and deliverables for the Project and ongoing operations</li> </ul>	15%		
		<ul style="list-style-type: none"> <li>Experience successfully delivering projects that required effective management of sensitive data</li> </ul>	15%		
		<ul style="list-style-type: none"> <li>Understanding of problems to be solved and effectiveness of solution(s) proposed in solving the problems described</li> </ul>	15%		
		<ul style="list-style-type: none"> <li>Proposed fees and compensation (price)</li> </ul>	5%		
3.	Bidder interviews	<b>Assessment of Bidder interviews</b>	30%		/3
		<ul style="list-style-type: none"> <li>Demonstrated understanding of the problem to be solved and issues to be addressed in this project and operationally</li> </ul>	10%		
		<ul style="list-style-type: none"> <li>Demonstration of relevant expertise appropriate to this project; relevant experience in delivering similar projects and operations</li> </ul>	10%		
		<ul style="list-style-type: none"> <li>Demonstration of planned approaches to identify/confirm requirements, develop and implement the solution</li> </ul>	10%		
4.	Reference checks	<b>Assessment of reference checks</b>	20%		/2
		<ul style="list-style-type: none"> <li>Previous clients' level of satisfaction</li> </ul>	10%		
		<ul style="list-style-type: none"> <li>Previous clients' perceptions of skills, experience, abilities, and customer service</li> </ul>	10%		
		<b>Total</b>	<b>100%</b>		<b>/10</b>

## 6.9. Confidentiality

Proposals and information submitted by Bidders (including any financial information or internal policies and procedures) will be treated as proprietary, held confidential, and used only for evaluating the ability of the Bidder to handle the Project or, if the Bidder is the successful Bidder, to negotiate a contract for services. The details of any proposals will be shared only with the persons involved in the Project evaluation process and Engineers Canada's legal representatives, as necessary.

This RFP is, similarly, intended solely for the purposes of the Bidder and should not be further distributed to any party not involved in the preparation of the Bidder's proposal. The Review Team reserves the right to disqualify a Bidder from the selection process if any breach of confidence is determined by the Review Team or if information is used for purposes other than the submission of a proposal.

## 7. RFP Terms and Conditions

### 7.1. 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 into a service agreement 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 agreement with any of the Bidders;
- Re-advertise for new submissions or call for tenders for this work or for work of a similar nature.

Further, 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.** No Bidder shall acquire any legal, equitable, or contractual rights or privileges whatever until an agreement is signed.

### 7.2. Competitive Process

With the issuance of this RFP, Engineers Canada is making a business opportunity available to Bidders that have the experience and competence to enter into a service agreement to complete the work.

### 7.3. Proposal Revisions

All proposal revisions must be received by Engineers Canada prior to the RFP submission/closing date and time stated in Section 6 (RFP Submission & Assessment Process), above.

#### **7.4. Cost of Preparing Proposals**

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

#### **7.5. 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.

#### **7.6. 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.

#### **7.7. Notification of Success**

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

#### **7.8. Negotiation Delay**

If a written agreement cannot be concluded within fifteen (15) business days of notification to the successful Bidder, Engineers Canada may, in its sole discretion, terminate negotiations with that Bidder and either negotiate an 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.

#### **7.9. 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 6 (RFP Submission & Assessment Process), 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.

## **7.10. 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.

## **7.11. Proposal Documents**

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