



AMENDED REQUEST FOR PROPOSALS (RFP)

International Institutions and Degrees Data Management System

January 31, 2020 (*amended February 12, 2020*)

RFP Title:	International Institutions and Degrees Data Management System
Proposal Submission Deadline:	All RFP responses must be received by: 3:00 PM Eastern Time <u>February 28, 2020.</u>
E-Mail Response to:	Maria Arrieta Manager, Foreign Credential Recognition maria.arrieta@engineerscanada.ca Engineers Canada 300-55 Metcalfe Street Ottawa, ON K1P 6L5

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2. Introduction to Engineers Canada

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.

3. Purpose of RFP

Engineers Canada requires a cloud-based solution to provide a consolidated source of academic information of Non-Canadian Engineering Accreditation Board (CEAB) degrees, to help the engineering regulators with their work of assessing individual applicants for engineering licensure and their credentials. The solution is intended to be a tool to assist engineering regulators in judging the quality of an institution or program as part of the overall process of evaluating an International Engineering Graduate's application for licensure. We refer to the required solution as the "**Project**".

Engineers Canada is seeking proposals from firms ("**Bidders**") to provide a cloud-based solution. The winning Bidder will have the stability, knowledge, and skills to work as a partner with Engineers Canada in both the short and long-term.

3.1 Project Goals

The goals of the Project are as follows:

- Improve the way Engineers Canada's work is done to serve the needs of its end users: the engineering regulators;
- Improve the effectiveness and efficiency of Engineers Canada personnel through automation that streamlines existing processes; and
- Ensure that the solution aligns with Engineers Canada's IT strategy over the short- and long-term.

The cloud-based solution:

- Shall deliver information on country education systems, and international institutions and degrees.
- Shall minimize the staff time required to create and edit information in the IIDDD.

To that end, it is anticipated that the Project will require the following:

1. Cloud computing solution, test and training environments, technical test plan, data conversion plan, data migration plan, technical and user systems documentation.
2. Maintenance and enhancement approach and implementation roadmap for the next 3-7 years that includes technology maintenance and functional releases.
3. Development and delivery of a training program to ensure users have the knowledge to operate the cloud computing solution (i.e. User Training Program, Train the Trainer Program, Delivery of Train the Trainer Program to Engineers Canada staff).
4. Implementation of consultation services to Engineers Canada Project Team with respect to technical deployment approaches and tactics.
5. Suggestion of other optional value-added services or scope items that will contribute to the success of this Project.

4. RFP Terminology

Within the context of this RFP document, the following terminology will be used. For clarity, a brief explanation has been included.

- **Adaptability:** The quality of being able to adjust to new conditions. The capacity to be modified for a new use or purpose. In the context of data adaptability, data is easily updated, and new information is perceived as easy to add from administrators.
- **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 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, enhancement to the cloud computing model requiring source code changes completed by the Bidder to provide the specified functionality.
- **Desirable requirements:** Those requirements that can be met in an alternative form for the Proposal to receive consideration. Responses will be rated based on the degree to which they address requirements.
- **Durability (data):** Refers to *long-term data protection* (i.e. the stored data does not suffer from bit rot, degradation or other corruption).
- **Functional requirements:** A type of requirement that describes the capability that the cloud computing solution must have in terms of the behavior and information it will manage to address business requirements.
- **High-risk issues or bugs:** Refers to anything that comprise system security, data integrity and data durability, and core system functionality.
- **Mandatory requirements:** Those requirements that must be met to receive consideration.
- **Non-Canadian Engineering Accreditation Board (Non-CEAB) academic information:** For any undergraduate degree not accredited by the Canadian Engineering Accreditation Board (CEAB), Non-CEAB academic information refers to the context of the country's education system, information regarding the legitimacy of the specified institution and degree, and whether the degree meets academic requirements for professional licensure in that country.
- **Non-functional requirements:** A type of requirement that describes the performance or quality attributes the cloud computing solution is to meet.
- **User:** Any person making use of the Cloud computing solution.

5. Scope of Work and Key Deliverables

5.1 Cloud computing solution

Working directly with Engineers Canada Project Team, the Bidder will deliver a customized cloud computing solution that includes the migration and/or conversion of historic data from an existing database.

Deliverables:

- A cloud computing solution that meets requirements as agreed by Engineers Canada
- A test environment for the cloud computing solution, identical to the production environment
- A training environment for the cloud computing solution, identical to the production environment
- Technical Test Plan and Results for the entire solution
- Data Conversion Plan and Results
- Data Migration Plan and Results
- Technical system documentation
 - Architectural design document
- User system documentation (separate from user training)

Success Measures/Indicators:

- The cloud computing solution meets functional and non-functional requirements as agreed by Engineers Canada
- The cloud computing solution is adaptable to changes in Engineering Programs (“adaptability” as defined by Engineers Canada)
- No high-risk issues or bugs (“high-risk” as determined by Engineers Canada)
- Completion of data conversion / migration that meets requirements as agreed to by Engineers Canada
- Passing User Acceptance Testing (UAT)
- Completion of user and support training
- Compliance with IT architectural requirements

5.2 Cloud computing solution - Maintenance and Enhancement Roadmap

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

Deliverables:

- Roadmap for the maintenance of the technology platform for the next 3-7 years, including:
 - Monitoring of the technology platform and the responding of alerts and failures, and
 - Upgrades to the platform

Success Measure/Indicator:

- There is a maintenance plan for the cloud computing solution

5.3 User Training Program

Working directly with Engineers Canada, 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 cloud computing solution. This includes but is not limited to readiness of Engineers Canada staff to train users on an ongoing basis.

Deliverables:

- User Training Program
- Train the Trainer Program
- Delivery of Train the Trainer Program to Engineers Canada staff

Success Measure/Indicator:

- Evidence that the training program(s) is understood by users, including but not limited to, evidence that demonstrates that users have the knowledge to successfully operate and use the solution

5.4 Implementation Consultation Services

Provide consultation services to the Engineers Canada Project Team with respect to technical deployment approaches and tactics.

Deliverable(s):

- Recommended deployment and implementation approach(es)
- Perform deployment as required

Success Measure/Indicator:

- Delivery of a recommendation that considers project specific risks
- Delivery of a deployment approach that ensures User acceptance.
- Successfully deploy the system

5.5 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.

All deliverables are subject to approval and acceptance by Engineers Canada

6. RFP Process

6.1 RFP Schedule of Events (**AMENDED**)

The following is a list of key events from RFP issuance through to the anticipated date the Project will commence:

No.	Description	Key Dates
1	Issuance of RFP	January 31, 2020
2	Deadline for proposal submissions	<u>February 28, 2020</u>
3	Assessment of RFP Responses against Mandatory Requirements (determination of “Qualified Bidders”)	<u>March 2 -13, 2020</u>
4	Qualified Bidders are assessed against Desirable Requirements	<u>March 16 - 23, 2020</u>
5	Notification to Short-Listed Bidders	<u>March 23, 2020</u>
6	Bidders’ Interviews: Meeting(s) with Short-Listed Bidders (during week of)	<u>March 30 – April 3, 2020</u>
7	Reference checks	<u>April 14 - 17, 2020</u>
8	Issuance of Notice of Award (subject to negotiation of Master Service Agreement)	<u>April 21, 2020</u>

6.2 Review Team

Proposals will be evaluated by a review team comprised of Engineers Canada staff, which may include the Executive VP Regulatory Affairs; Manager, Operational Infrastructure; Manager, Regulator Liaison; Manager, Foreign Credential Recognition; Researcher, International Institutions; Controller; and/or Legal Counsel (the “**Review Team**”), and any other individual(s) that the Review Team considers necessary, at its sole discretion.

6.3 Assessment Process

6.3.1 Stage 1 – Assessment of RFP Responses – Mandatory Requirements

Bidders are asked to respond to this RFP by completing the Bidders Response Package in Appendix “A.” Upon the closing of the RFP submission period, the information and responses provided in Appendix “A” will be reviewed by the Review Team (the “**Initial Assessment**”).

The Initial Assessment will focus on the answers Bidders provide to the mandatory requirements (those set out in sections 3.2 and 3.3 of Appendix “A”) in accordance with the evaluation criteria stated in section 6.4.1, below. Bidders who fail to meet mandatory requirements will not be qualified to proceed in the RFP process and will be eliminated from further evaluations. Bidders who meet mandatory requirements (the “**Qualified Bidders**”) will proceed to have their proposals considered in accordance with the next stage of the RFP process.

6.3.2 Stage 2 – Assessment of Qualified Bidders’ RFP Responses – Desirable Requirements

Engineers Canada will score the responses of Qualified Bidders (provided in response to sections 4.2 to 4.4 of Appendix “A”) in accordance with the criteria stated in section 6.4.2. below and will award an overall score with respect to each Bidder.

The top-scoring three (3) Bidders for Stage 2 (the “**Short-Listed Bidders**”) will be invited to participate in a Bidders’ Interviews.

6.3.3 Stage 3 – Bidders’ interviews

Short-Listed Bidders will be required to participate in Bidders’ Interviews, where members of the Review Team will ask Bidders questions related to the functionality, usability, and technical alignment of the proposed solution as well as questions to confirm Bidders’ stated skills, experience and ability to provide the requested services and deliverables. At this stage, Bidders will also be provided the opportunity to ask questions of the Engineers Canada Review Team.

To facilitate comprehensive responses at the Bidders’ Interviews, Bidders must submit written questions to Maria Arrieta, Manager Foreign Credential Recognition (Maria.Arrieta@engineerscanada.ca) no later than **one week** in advance of the scheduled Bidders’ Interview date.

6.3.4 Stage 4 – Reference check

Following the Bidder interviews, the Review Team will complete its final assessment, tallying a final score for the Short-Listed Bidders. The Review Team will then contact the top-scoring one or two Bidders’ references and, upon positive confirmation of the Bidders’ skills, experience, abilities, customer service, etc., the Review Team will proceed to select and notify the successful Bidder.

6.4 Evaluation

Bidders will be evaluated based on the combined results of the following Stages:

Stage	Description	Weighting
1.	Assessment of RFP Responses - Mandatory Requirements	Elimination
2.	Assessment of Qualified Bidders’ RFP Responses - Desirable Requirements <u>Evaluation:</u> <ul style="list-style-type: none">• Confidence in the ability to provide the requested services and deliverables for project and ongoing operations - 50%• Quality and completeness of responses - 5%• Qualification of personnel assigned to the project 15%• Proposed fees and compensation 30%	50%
3.	Bidder interviews	30%
4.	References check	20%
	Total	100%

6.4.1 Stage 1 – Evaluation

Bidders who answer “Yes” to each of the questions posed in Section 3.2.1 of Appendix “A” and who are shown to be **viable partners***, taking into consideration responses provided in the Due Diligence Questionnaire (Section 3.3 of Appendix “A”), shall be deemed Qualified Bidders and will move 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.

6.4.2 Stage 2 - Evaluation of Qualified Bidders' RFP Responses – Desirable Requirements

Bidder responses to each question in Sections 4.2 of Appendix “A” (functional and non-functional solution requirements) and 4.3 of Appendix “A” (Bidders Practices) will be evaluated as follows:

	Score
No issues identified	4
Minor issues identified	3
Some issues identified and may pose a risk	2
Issues identified are of major concern	1
No information available	0

Information provided in Section 4.4 of Appendix “A” (Costing 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.**

6.4.3 Stage 3 – Bidder interviews

The Bidder interviews will be scored based on responses to questions pertaining to the functionality, usability, and technical alignment of the proposed solution and any other questions the Review Team may ask to confirm the Bidders’ stated skills, experience and ability to provide the requested services and deliverables.

The bidder interviews will be scored for functionality according to the following:

	Score
Capability to provide full functionality was demonstrated	4
Capability to provide most functionality was demonstrated	3
Capability to provide basic functionality was demonstrated; requires supplemental technology, and/or other workaround	2
Capability to provide basic functionality was demonstrated; requires manual workarounds	1
Capability to provide functionality was not demonstrated	0

The bidder interviews will be scored for usability according to the following:

	Score
Excellent	4
Good	3
Neutral	2
Poor	1
Unusable	0

The bidder interviews will be scored for technical alignment according to the following:

	Score
No issues identified	4
Minor issues identified	3
Some issues identified and may pose a risk	2
Issues identified are of major concern	1
No information available	0

Specifically, we might request confirmation about some aspects of technical alignment, such as architecture, development tools, processes and standards, adaptability, application reporting, and, operational and analytical reporting.

6.4.4 Stage 4 – Bidder reference checks

Engineers Canada will complete reference checks for the top-scoring Bidders.

The bidder references will be scored according to the following:

	Score
No issues identified	4
Minor issues identified	3
Some issues identified and may pose a risk	2
Issues identified are of major concern	1
No information available	0

7. Proposal Format

To confirm the criteria required in Stages 1 and 2 of the RFP process, Bidders must include with their proposal the following:

- Covering letter and overview of their organization, capabilities, and solution technology
- Fully Completed Appendix A: Bidders Response Package

Bidders who proceed to Stage 3 may be asked to provide three references.

7.1 How to Submit a Proposal (**AMENDED**)

To be considered, proposals must be submitted electronically no later than **February 28, 2020** at 3:00 pm EST (the “**Proposal Submission Deadline**”) to:

Maria Arrieta, Manager Foreign Credential Recognition

Maria.Arrieta@engineerscanada.ca

Engineers Canada

300-55 Metcalfe Street

Ottawa, ON K1P 6L5

Any proposal submissions received after the Proposal Submission Deadline will not be considered.

7.2 Inquiries

Questions concerning this RFP may be submitted by email and directed to Maria Arrieta at Maria.Arrieta@engineerscanada.ca

Note: Any questions pertaining generally to the RFP process, and responses given, will be provided, via email, to all Bidders using the contact information provided in their Bidders’ Response Packages.

7.3 Confidentiality

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 with the selection and approval process.

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.

8. RFP Terms and Conditions

8.1 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 applies, 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;
- Conduct negotiations with one or more Bidders;
- Cancel and reissue the RFP;
- Issue the Notice of Award to a Bidder who does not achieve the highest score in the evaluation criteria (section 6.4)
- Extend any of the stated dates and deadlines and/or amend the procurement or evaluation process, including the criteria for evaluation;
- 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.**

8.2 Competitive Process

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

8.3 Proposal Revisions

All proposal revisions must be received by Engineers Canada prior to the Proposal Submission Deadline.

8.4 Cost of Preparing Proposals

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

8.5 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 (as set out in section 7.2) 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.

8.6 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.

8.7 Notification of Success

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

8.8 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 6.4, 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.

The full execution of a written service agreement will constitute a contract for the services, and no Bidder will acquire any legal or equitable rights or privileges relative to the services until a written Notice of Award has been delivered and a written agreement has been duly executed.

8.9 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 section 8.8, above.

8.10 Proposal Documents

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