



REQUEST FOR PROPOSALS (RFP)

National Membership Database

RFP Title:	National Membership Database
Proposal Submission Deadline:	All RFP responses must be received by: <i>1:00 PM Eastern Time November 6, 2020.</i>
E-Mail Response to:	Megan Falle Manager, Regulatory Liaison Engineers Canada Megan.Falle@engineerscanada.ca 300-55 Metcalfe Street Ottawa, ON K1P 6L5

Table of Contents

1.	Introduction to Engineers Canada	4
2.	Purpose of RFP	5
2.1	Project Goals.....	5
2.2	Project Duration	5
3.	RFP Terminology	6
4.	Scope of Work and Key Deliverables	7
4.1	Cloud computing solution.....	7
4.2	Cloud computing solution - Maintenance and Enhancement Roadmap	7
4.3	User Training Program.....	7
4.4	Implementation Consultation Services	8
4.5	Additional Services	8
5.	RFP Process	9
5.1	RFP Schedule of Events.....	9
5.2	Review Team	9
5.3	Assessment Process	9
5.3.1	Stage 1 – Assessment of RFP Responses – Mandatory Requirements.....	9
5.3.2	Stage 2 – Assessment of Qualified Bidders’ RFP Responses – Project Needs	10
5.3.3	Stage 3 – Bidders’ Interviews	10
5.3.4	Stage 4 – Reference Checks	10
5.4	Evaluation	11
5.4.1	Stage 1 - Evaluation of Mandatory Requirements.....	12
5.4.2	Stage 2 - Evaluation of Qualified Bidders’ RFP Responses – Project Needs.....	12
5.4.3	Stage 3 - Evaluation of Bidders Interviews.....	12
5.4.4	Stage 4 – Evaluation of Reference Checks	13
6.	Proposal Format	14
6.1	How to Submit a Proposal	14

6.2	Inquiries.....	14
6.3	Confidentiality.....	14
7.	RFP Terms and Conditions.....	15
7.1	Process Conditions	15
7.2	Competitive Process	15
7.3	Proposal Revisions	15
7.4	Cost of Preparing Proposals	15
7.5	Clarification of Proposal	15
7.6	Acceptance of RFP Conditions.....	16
7.7	Notification of Success.....	16
7.8	Reservation of Rights.....	16
7.9	Limitation of Damage	16
7.10	Proposal Documents.....	16

1. 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.

2. Purpose of RFP

Engineers Canada requires a new solution to facilitate inter-association engineering licensure by allowing provincial and territorial engineering regulators to share information about their licence holders. 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 extensive knowledge and experience in data security and will have the stability, knowledge, and skills to work as a partner with Engineers Canada.

More information, including the specific Project requirements, are provided in the attached Appendix “A”: Bidders Response Package.

2.1 Project goals

The goals of the Project are as follows:

- Ensure and demonstrate data security and compliance with provincial and territorial privacy laws;
- Improve service to regulator clients with a specific focus on improving the user experience for regulator staff, and ensuring regulators have control of their own data;
- Improve the effectiveness and efficiency of regulator staff and Engineers Canada personnel; and
- Support the short-term and long-term goals for viability of information technology.

The business objectives of the National Membership Database (NMDB) solution are as follows:

- Deliver accurate and current information on license holders of the 12 engineering regulators;
- Provide enough information for regulators to confirm the standing of applicants who are already licensed by another Canadian engineering regulator;
- Provide an upload/import feature for each regulator to provide their information on license holders;
- Minimize engineering regulator staff time required to upload and search for information in the NMDB; and
- Permit engineering regulators to manage their own database users.

3. 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 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:** Refers to anything that comprises system security, data integrity and data durability, and core system functionality.
- **IaaS:** Infrastructure as a service
- **Inter-association applicant:** an individual who already holds an engineering licence from one or more Canadian engineering regulators, who is seeking to obtain an additional engineering licence from another Canadian engineering regulator.
- **Mandatory requirements:** Those requirements that must be met in order 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 in the first place.

4. Scope of work and key deliverables

All deliverables are subject to approval and acceptance by Engineers Canada.

4.1 Cloud computing solution

Working directly with the Engineers Canada Project team, the Bidder will deliver a customized cloud computing solution.

Deliverable(s):

- A cloud computing solution, built in Azure, that meets requirements as defined by Engineers Canada and which follows methodologies found in [Azure's "well architected framework" documentation](#);
- An Azure test environment for the cloud computing solution;
- Technical test plan and results;
- Technical system documentation; and
- User system documentation (separate from user training).

Success measures/indicators:

- The cloud computing (Azure) solution meets data security needs as defined by Engineers Canada;
- No high-risk issues or bugs;
- Passes user acceptance testing;
- Completion of user and support training; and
- Compliance with IT architectural requirements.

4.2 Maintenance and enhancement roadmap

Considering the needs of the Project and the medium-term and longer-term needs of Engineers Canada, the 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 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.

4.3 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.

Deliverable(s):

- Development and delivery of bilingual user training program; and

Development and delivery of train-the-trainer program.

Success measure/indicator:

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

4.4 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 approaches;
- Assist the regulators with the technical deployment (e.g. database extracts from their systems, format to specifications, and uploads to the new solution); and
- Recommended approach and technical plan for ongoing maintenance and future deployments.

Success measure/indicator:

- Delivery of a recommendation that considers project specific risks;
- Delivery of a deployment approach that ensures user acceptance; and
- Successful deployment of the system.

4.5 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.

5. RFP process

5.1 RFP schedule of events

The following is a list of key events from RFP issuance through to the anticipated date the Project will commence. Dates are subject to change by Engineers Canada, at its sole discretion:

No.	Description	Key Dates
1	Issuance of RFP	Oct 16, 2020
2	Deadline for proposal submissions	Nov 6, 2020
3	Assessment of RFP responses against mandatory requirements (determination of "Qualified Bidders")	Nov 13, 2020
4	Qualified Bidders are assessed against Project needs	Nov 13, 2020
5	Notification to Short-Listed Bidders	Nov 17, 2020
6	Interview(s) with Short-Listed Bidders	Dec 4, 2020 – Dec 11, 2020
7	Assessment of interviews with Short-Listed Bidders	Dec 14, 2020 – Dec 16, 2020
8	Reference checks	Dec 16, 2020 – Dec 21, 2020
9	Notice of Award (conditional)	Dec 22, 2020
10	Contract negotiations completed (estimated)	Feb 28, 2021
11	Project commencement	March 5, 2021

5.2 Review team

Proposals will be evaluated by a review team comprised of Engineers Canada staff, which may include the following members: the Executive Vice-President, Regulatory Affairs; Manager, Regulatory Liaison; Legal Counsel; Director, Finance; Manager, Operational Infrastructure; Manager, Organizational Excellence. The review team may include any other individual(s) that they consider necessary, at its sole discretion.

5.3 Assessment process

5.3.1 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 2.2 and 2.3 of Appendix "A") in accordance with the evaluation criteria stated in section 5.4.1, below.

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.

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.

5.3.2 Stage 2 – Assessment of Qualified Bidders’ RFP responses – Project needs

Engineers Canada will score the responses of Qualified Bidders (provided in response to section 3 of Appendix “A”) in accordance with the criteria stated in section 5.4.2. below and will award an overall score with respect to each Qualified Bidder.

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

5.3.3 Stage 3 – Bidder interviews

The Short-Listed Bidders will receive a statement of requirements that will provide a problem scenario (including contextual information) and a brief summary of requirements of the solution. They will have two weeks to prepare a presentation/demonstration of a proposed solution.

At a meeting with the Engineers Canada review team, the Short-Listed Bidders will present/demonstrate their proposed solution. This presentation/demonstration must, 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 security needs.

The Engineers Canada review team will be provided the opportunity to ask questions related to 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. The Engineers Canada review team will then assess and score the interview in accordance with criteria defined below in section 6.4.3.

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 Bidder interviews, Bidders must submit written questions to Megan Falle, Manager, Regulatory Liaison (Megan.Falle@engineerscanada.ca) no later than **24 hours** in advance of the Bidder’s scheduled interview date. Attendance at the Bidder interview is mandatory to be considered for the Project.

5.3.4 Stage 4 – Reference checks

The Engineers Canada review team will complete its final assessment, tallying a final score for the Short-Listed Bidders. The Engineers Canada Review Team will then contact Bidders’ references, then assess and score the reference checks in accordance with criteria defined below in section 5.4.4.

5.4 Evaluation

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

Stage		Description	Weighting
1	Bidder package review	<p>Assessment of RFP responses – Mandatory requirements</p> <ul style="list-style-type: none"> • Mandatory requirements • Due diligence questionnaire (DDQ) - Financial and business stability, as evidenced through the DDQ 	Elimination
2		<p>Assessment of Qualified Bidders – Project needs</p> <ul style="list-style-type: none"> • Confidence in the ability to provide the requested services and deliverables for project and ongoing operations – 15% • Experience successfully delivering projects that required effective management of sensitive data – 15% • Understanding of problems to be solved and effectiveness of solution(s) proposed in solving the problems described – 15% • Proposed fees and compensation (price) – 5% 	50%
3	Bidder interviews	<p>Assessment of Bidder interviews</p> <p>The interview (demonstration/presentation) will be scored based on Bidders' demonstrated skills, experience, and ability to provide the requested services and deliverables.</p> <ul style="list-style-type: none"> • Demonstrated understanding of the problem to be solved and issues to be addressed in this project and operationally – 10% • Demonstration of relevant expertise appropriate to this project; relevant experience in delivering similar projects and operations – 10% • Demonstration of planned approaches to identify/confirm requirements, develop and implement the solution. - 10% 	30%
4	Calls to references provided by Bidders	<p>Assessment of reference checks</p> <ul style="list-style-type: none"> • Previous clients' level of satisfaction – 10% • Previous clients' perceptions of skills, experience, abilities, and customer service – 10% 	20%

5.4.1 Stage 1 - Evaluation of mandatory requirements

Bidders who answer “Yes” to each of the questions posed in Section 2.2 of Appendix “A” and who are shown to be **viable partners**^{*}, taking into consideration responses provided in the due diligence questionnaire (Section 2.3 of Appendix “A”), shall be deemed Qualified Bidders and will move on to stage 2 of the RFP process.

5.4.2 Stage 2 - Evaluation of Qualified Bidders’ RFP responses – Project needs

Bidder responses to each question in Section 3 of Appendix “A” (Project Needs) will be evaluated as follows:

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

Information provided in Section 3.4 of Appendix “A” (Costing Information) will be used to inform the Engineers Canada 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. In the event of a tied scoring for two or more bidders, the lowest proposed fees and compensation will be used to identify the successful Bidder.

5.4.3 Stage 3 - Evaluation of Bidder interviews

The interview (demonstration/presentation) will be evaluated based on Bidders’ demonstrated skills, experience, and ability to provide the requested services and deliverables as described in Section 5.4. Evaluation will be as follows:

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

^{*} **Viable partners** refer to Bidders who demonstrate, to Engineers Canada’s satisfaction, that they would, if selected, be financially stable, and legally and ethically sound. The Engineers Canada review team will take into consideration all comments, mitigating circumstances and explanatory notes provided by the Bidder in connection with its responses.

5.4.4 Stage 4 – Evaluation of reference checks

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

Bidder references will be scored as follows:

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

6. Proposal format

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

- Covering letter and overview of their organization, capabilities, and solution technology; and
- Fully completed Appendix “A”: Bidders Response Package.

6.1 How to submit a proposal

To be considered, proposals must be submitted electronically no later than **November 6, 2020 at 1:00pm ET** (the “**Proposal Submission Deadline**”) to:

Megan Falle
Manager Regulatory Liaison
Engineers Canada
Megan.Falle@engineerscanada.ca

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

6.2 Inquiries

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

Note: Any questions pertaining to the RFP process, and responses given, will be posted on Engineers Canada’s website at engineerscanada.ca

6.3 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.

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 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 5.4)
- 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.** 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 Proposal Submission Deadline.

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 (as set out in section 6.2) 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.

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, transmitted via email to the Bidder at the address provided in its proposal, shall be the only valid form of notification of success in response to this RFP.

7.8 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 5.4, above, as determined in the sole discretion of Engineers Canada
- change the RFP timeline or other portions of this RFP and may cancel or re-issue the RFP at any time without obligation or liability
- not accept any proposal
- 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.

7.9 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.
- 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 7.8, above.

7.10 Proposal documents

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