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Finance and Corporate Services Division  
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**REQUEST FOR PROPOSALS (“RFP”) NUMBER 16-1298**  
**PROVINCIAL ORGAN AND TISSUE DONATION INFORMATION**  
**MANAGEMENT SYSTEM**  
**DEPARTMENT OF HEALTH**

**RFP Issue Date: March 3, 2017**

**RFP Closing: April 3, 2017 14:00:59 Alberta Time**

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## TABLE OF CONTENTS

<b>1.0</b>	<b>GENERAL</b>	<b>4</b>
1.1	Introduction	4
<b>2.0</b>	<b>RFP PROCESS</b>	<b>4</b>
2.1	RFP Terminology	4
2.2	RFP Schedule of Events	5
2.3	Bidders' Conference	6
<b>3.0</b>	<b>PROJECT INFORMATION</b>	<b>6</b>
3.1	Project Overview	6
3.1.1	Introduction	6
3.1.2	Project Objectives	7
3.1.3	Background	7
3.1.4	Project Duration	9
3.1.5	Project Scope	9
3.1.6	Customization	10
3.1.7	Related Project Documents	10
3.1.8	Project Structure	11
3.1.9	Key Stakeholders:	13
3.2	Project Requirements	13
3.2.1	Solution Requirements	13
3.2.2	Architecture and Standards	14
3.2.3	Implementation	14
3.2.4	Interface	14
3.2.5	Project Status Reporting	14
3.2.6	Department Supplied Resources	14
3.2.7	Service Levels	14
3.2.8	Security	15
3.2.9	Conversion/Transition	15
3.2.10	Acceptance Testing	15
3.2.11	Documentation	15
3.2.12	User Training	17
3.2.13	FOIP and HIA	18
3.2.14	Maintenance and Solution Support	19
3.2.15	Change Order Process	19
3.2.16	Other Services	19
3.2.17	Deliverable Review Process	20
3.2.18	Deliverable Acceptance Process	20
<b>4.0</b>	<b>EVALUATION CRITERIA</b>	<b>20</b>
<b>5.0</b>	<b>PROPOSAL CONTENT GUIDELINES</b>	<b>21</b>
5.1	Proposal Format	21
5.2	Proposal Content	21
5.2.1	Proposal Submission	21
5.2.2	Vendor Profile	22
5.2.3	RFP Requirements	23
5.2.4	RFP Administration Terms and Conditions	24
5.2.5	Standard Contract Provisions	24

<b>5.2.6</b>	<b>Vendor's Proposed Contract Provisions.....</b>	<b>25</b>
<b>5.2.7</b>	<b>Appendices.....</b>	<b>25</b>

## **1.0 GENERAL**

### **1.1 Introduction**

Vendors are invited to submit Proposals for the provision of the Services and Materials as specified in this RFP.

This RFP will be conducted with the objective of maximizing the benefit to Her Majesty, while offering Vendors a fair and equitable opportunity to participate.

Vendors are advised to pay careful attention to the wording used throughout this RFP. Failure to satisfy any term or condition of this RFP may result in an unacceptable Proposal.

Facsimile or digital Proposals in any form (e.g. diskette files, disk files, tape files, e-mailed files) will not be accepted.

The RFP Administration Terms and Conditions attached as Appendix V form part of this RFP. Vendors by submitting a Proposal are deemed to have accepted all of the RFP Administration Terms and Conditions in Appendix V.

## **2.0 RFP PROCESS**

### **2.1 RFP Terminology**

Terminology used throughout this RFP is defined in Appendix A, Appendix V and as follows:

- **“Alberta Health Services” or “AHS”** is the regional health authority created pursuant to the *Regional Health Authorities Act* (Alberta) that is responsible for administering health services in Alberta.
- **“Alberta Health”, “Department of Health”, “Department”, and “Province”** mean Her Majesty the Queen in right of Alberta, as represented by the Minister of Health.
- **“Configuration”** means any change or enhancement to the Software not requiring source code changes completed by the Vendor to provide the specified functionality.
- **“Customization”** means any change or enhancement to the Software requiring source code changes completed by the Vendor to provide the specified functionality.
- **“Deliverable” or “Deliverables”** means Materials created by the Contractor under the Contract requiring formal acceptance and sign-off by the Province. The Solution is a Deliverable for the purposes of this RFP and Contract.
- **“DiMS”** means a donation information management system.

- **“FOIP Act”** means the Freedom of Information and Protection of Privacy Act (Alberta), as amended from time to time.
- **“HIA”** means the Health Information Act (Alberta), as amended from time to time.
- **“Incident”** means an event that is not part of normal operations that disrupts operational processes
- **“Material”** or **“Materials”** means any work, information, records or materials, regardless of form, which are made, generated, produced or acquired by the Contractor or its employees, subcontractors or agents in the course of performing the Services.
- **“Privacy Acts”** means the FOIP and the HIA, as applicable.
- **“Software”** means proposed Software marketed by the Vendor that meets or exceeds all of the requirements specified in the RFP without Customization.
- **“Software-as-a-Service” or “SaaS”** means a solution delivery model in which software, data, content, and sometimes other services (such as training and end-user support) are hosted by one or more service providers. SaaS is typically delivered through license based on usage metrics or on a pay-for-use basis to the client. In this service model, the cost of hardware/software maintenance support is the responsibility of the service provider.
- **“Solution”** means proposed Software marketed by the Vendor plus Configuration or Customization that will meet or exceed all of the requirements specified in the RFP.
- **“Solution Administrator”** means any User of the Solution that is permitted access to administer and configure the Solution.
- **“User”** means any person making use of the Solution.
- **“User Acceptance Testing”** means the tests the Department will conduct on the Solution to determine whether the Solution performs according to the Vendor’s published specifications, industry standards, the Contract, the RFP, and the Proposal.

## 2.2 **RFP Schedule of Events**

**RFP Issue Date:** March 3, 2017

**Bidders’ Conference Date:** March 16, 2017

**RFP Closing Date:** April 3, 2017

**Evaluation of Proposals:** April 5 – 19, 2017

**Shortlist Presentation and Software Demonstration:** To be determined

**Selection of Preferred Vendor:** May 12, 2017

The above dates are subject to change at the sole discretion of Her Majesty.

## **2.3 Bidders' Conference**

A Bidders' Conference has been scheduled to provide an opportunity for clarification regarding this RFP's requirements, and to address any other issues with this RFP:

Date: March 16, 2017

Time: 1:30 PM Alberta Time

Location: Room 20D, ATB Place, 10025 Jasper Avenue, AB T5J 1S6

(A visitor pass is required in order to access the conference room above. Please check in with Central Reception on the main floor of ATB Place to receive your visitor pass.)

Teleconference Coordinates:

Dial-in number: 1-866-210-4704

Conference code: 4511-613-040

To facilitate comprehensive responses at the Bidders' Conference it is recommended that written questions be submitted to the Contracting Manager at least 1 day in advance of the Bidders' Conference.

Attendance at the Bidders' Conference is not mandatory, but is highly recommended. Vendors can obtain the written minutes of the Bidders' Conference from APC.

## **3.0 PROJECT INFORMATION**

### **3.1 Project Overview**

#### **3.1.1 Introduction**

The mission of the Department of Health is to “set policy and direction to lead, achieve and sustain a responsive, integrated and accountable health system.” The Department's vision is “Healthy Albertans in a healthy Alberta.”

In November 2013 the *Human Tissue and Organ Donation Act* (HTODA) established the Alberta Organ and Tissue Donation Program (AOTDP). According to this legislation, the purposes of AOTDP are to:

- Coordinate and support the work of donation organizations in managing the system of donation in Alberta
- Educate the public and health care community and work with health professionals and their respective organizations to increase awareness about human tissue and organ donation in Alberta
- Support, encourage, and oversee the use of the online registry (Alberta Organ and Tissue Donation Registry)

- Monitor and measure the system of donation in Alberta, and
- Perform any other function prescribed in the regulations

### **3.1.2 Project Objectives**

The Province is looking to obtain a single province-wide organ and tissue donation information management system (DiMS) that is delivered as SaaS to enable the AOTDP, Organ Donation Organizations (ODOs) and tissue banks to manage and improve organ and tissue donation.

Specific objectives include:

- Improved donor management which would support increased organ utilization, easier organ sharing and allocation, and increased access to transplantation
- Enhanced operational effectiveness and efficiency in organ, tissue, and ocular donation
- Reduced duplication of data entry, standardized data elements, and improved data quality
- Better management and planning ability
- Day-to-day and extended forecasting of the provincial organ and tissue donation system
- Accurate donation information consolidated from multiple sources and accessible from a single view
- Standardized donation definitions and data capture
- Increased data to support performance monitoring and quality improvement
- Transparent tracking of key performance indicators
- Aligned data definitions, elements, and standards
- Capacity for provincial performance reporting based on reliable data
- Improved stakeholder relations, enriched working relationships, improved communication, and efficient sharing of donation and program information
- Alignment with national reporting systems (CTR)

The anticipated average user base is as follows:

- 100 users from the ODOs and tissue banks
- 20 users from the AOTDP

### **3.1.3 Background**

Currently, there is no single, integrated provincial electronic donation information management system in Alberta. Such absence has resulted in a number of business and operational challenges. Over the past decade, Alberta's performance in organ donation has declined from being a national leader to now, at the lower end of the spectrum. For over two decades, Alberta has had two distinct organ and tissue donation programs, North (Human Organ Procurement and Exchange, HOPE) and South (Southern Alberta Organ and Tissue Donation

Program, SAOTDP). There has been minimal coordination between these two programs. From a national perspective, Canadian Blood Services (CBS) treats Alberta as two separate provinces for its organ and tissue donation programs. This lack of standardization creates many challenges and issues:

- Inability to optimize donation and improve service quality
- Inability to provide timely and accessible provincial donor information to achieve its legislated mandate to monitor and measure the system of donation in Alberta
- Lack of integration of systems impedes timely sharing of donor information
- Data not standardized or coordinated provincially hindering quality improvement
- Data accessed from up to 12 different sources resulting in clinical and administrative inefficiencies
- Organ donation being Calgary- or Edmonton-centric, with no provincial view resulting in inconsistencies
- Lack of provincial public reporting resulting in lack of transparency regarding organ donation and utilization
- Lack of data on outcomes hinders optimization of tissue utilization
- Lack of provincial public reporting results in lack of transparency regarding tissue donation and utilization
- Lack of provincial data standards, terminology, and definitions impeding effective reporting on organ and tissue donation provincially
- Duplication of effort and inefficiencies coordinating donor information resulting in waste of time and resources in time sensitive processes for offering and allocation
- Data quality assurance issues related to manual data entry potentially resulting in compromise on patient safety
- Lack of consistent data regarding tissue inventory and distribution potentially leading to inefficient tissue utilization
- Lack of an automated, coordinated, provincial system impeding optimized organ and tissue donation and utilization
- Inefficient provincial information management processes causing issues regarding data collection, consolidation, and distribution

The HOPE Program currently operates with a heavy reliance on manual, paper charting, Excel spreadsheets, Word documents, and Access databases. The program lacks the ability to incorporate real-time information and reports into donation management processes. Operating inefficiencies are inherent in manual information management processes. Not only is there an inability provincially to effectively share and compare HOPE data with SAOTDP data, this problem is magnified when reporting provincially to the Department of Health and nationally to CBS, as it is difficult to provide a provincial view.



SAOTDP leverages the ALTRAbase system to support its donation management activities. ALTRAbase was developed in-house by the former Calgary Health Region in 1997. It serves as a communication tool between multidisciplinary team members.

AOTDP requires a province-wide DiMS for organ and tissue donation management. While the Province possesses the capacity to both register an Albertan's intent and consent for organ and tissue donation, as well as a system to support the transplant process, it lacks a single province-wide donation information management system to manage organ, tissue, and ocular donations.

In November 2015, the Department issued a Request for Information (RFI) surveying the market. Based on the responses received, the Province is seeking a Solution delivered as SaaS.

#### **3.1.4 Project Duration**

The anticipated duration of Services is from May 23, 2017 to May 22, 2019. The Province, in its discretion, will confirm actual start and end dates for the Services upon finalizing the Contract.

The Province reserves the right to extend the term of the Contract, under the same terms and conditions, including pricing, for up to 36 months to perform the Services.

#### **3.1.5 Project Scope**

The scope of the RFP includes:

- License to the proposed Solution that meets the DiMS functional requirements
- Hosting the Solution on infrastructure in Canada
- Testing and quality assurance of the Solution (Alberta-specific Configuration and Customization of the solution)
- Acceptance testing support
- Set up testing, training and production environments
- Configuration and set up to mirror Alberta ODOs donation processes
- Delivery of training for Users
- Providing donation management system manuals and documentation for Solution Users
- Providing ongoing Solution maintenance and support
- Help Desk Services

### 3.1.6 **Customization**

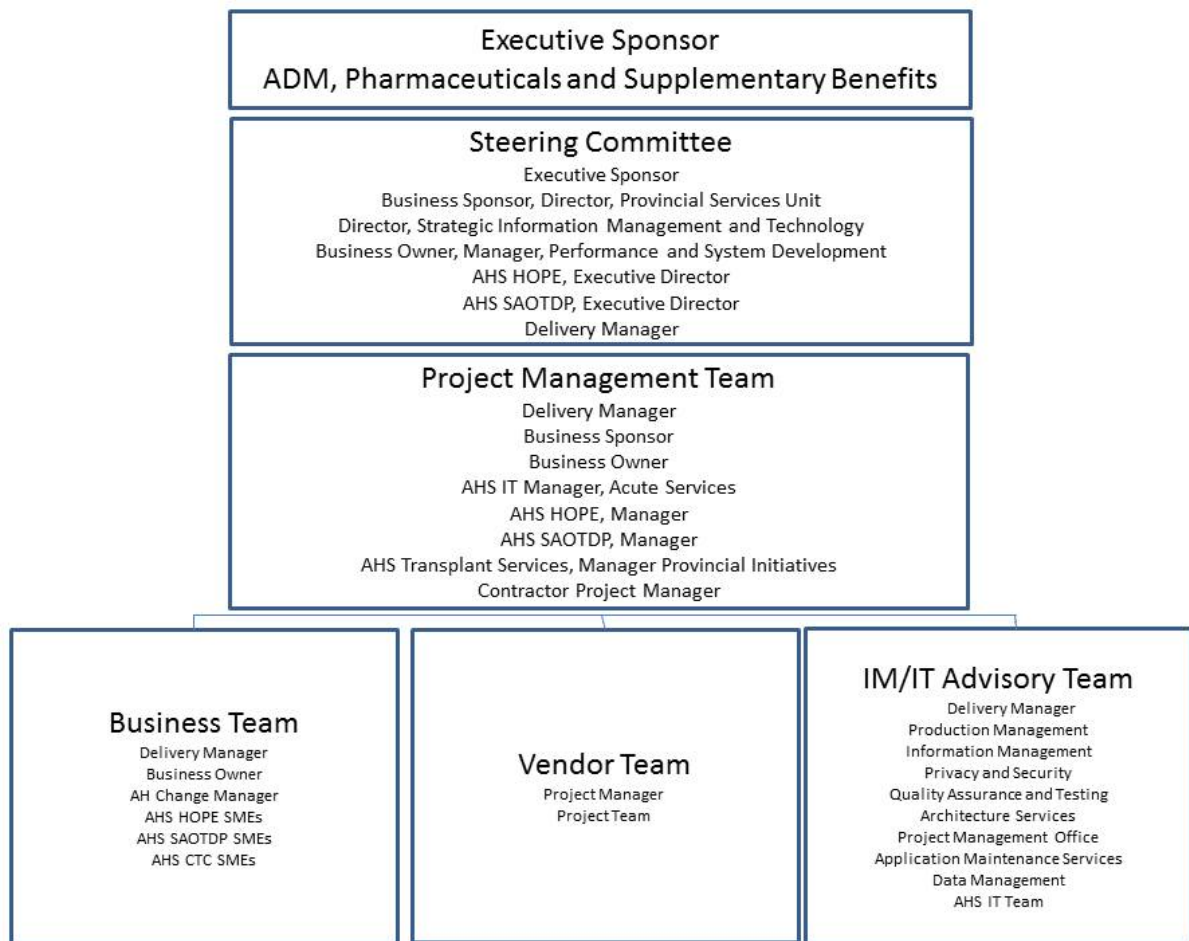
The Vendor may be required to perform Customization to provide certain functionalities as required in Appendix C –*Solution Functionality and Non-Functional Requirements*.

### 3.1.7 **Related Project Documents**

The following documents may be of interest to the Vendor in preparation of a response to this RFP:

Description	Where to Find
Health Information Act (Alberta)	web: <a href="http://www.qp.alberta.ca/documents/Acts/H05.pdf">http://www.qp.alberta.ca/documents/Acts/H05.pdf</a>
FOIP “Vendors Guide to the FOIP Act Brochure”	web: <a href="http://www.servicealberta.ca/foip/documents/VendorBrochure.pdf">http://www.servicealberta.ca/foip/documents/VendorBrochure.pdf</a>
Health Canada “Guidance Document for Cell, Tissue and Organ Establishments - Safety of Human Cells, Tissues and Organs for Transplantation”	web: <a href="http://www.hc-sc.gc.ca/dhpm/brgtherap/reg-init/cell/cto_gd_ld-eng.php">http://www.hc-sc.gc.ca/dhpm/brgtherap/reg-init/cell/cto_gd_ld-eng.php</a>
CSA Standards	web: <a href="http://www.hc-sc.gc.ca/dhpm/brgtherap/reg-init/cell/cto_gd_ld-eng.php#a14">http://www.hc-sc.gc.ca/dhpm/brgtherap/reg-init/cell/cto_gd_ld-eng.php#a14</a>
American Association of Tissue Banks (AATB)	web: <a href="http://www.aatb.org/">http://www.aatb.org/</a>
Eye Bank Association of America (EBAA)	web: <a href="http://restoresight.org/">http://restoresight.org/</a>
HISCA Approved Standard Alberta Laboratory Test Results Delivery specification	Appendix H - <i>HISCA Lab Test Results Delivery Message Specification</i>
Alberta Health Provincial Logging and Audit Standard (PLAS)	Appendix I - <i>Provincial Logging and Audit Standard</i>

### 3.1.8 Project Structure



Role	Responsibilities
<b>Executive Sponsor</b>	<ul style="list-style-type: none"> <li>Approve overall initiative scope and schedule (Initiative Delivery Plan)</li> <li>Authorize overall initiative and project budget</li> <li>Approve budget changes</li> <li>Approve contracts and contract changes</li> <li>Obtain resolution of issues required to continue project activities, when escalated</li> </ul>
<b>Steering Committee</b>	<ul style="list-style-type: none"> <li>Provide final authority on resolution of major project issues that are outside the control of the Business Sponsor</li> <li>Recommend approval of project scope, schedule and/or budget</li> <li>Participate in ongoing project communication processes</li> </ul>

Role	Responsibilities
<b>Business Team</b>	<ul style="list-style-type: none"> <li>▪ Provide business advice and expertise</li> <li>▪ Provide and confirm business requirements</li> <li>▪ Participate in business process redesign to align with business application solution</li> <li>▪ Identify issues for resolution</li> <li>▪ Review and recommend approval of Deliverables from a business perspective</li> <li>▪ Produce business deliverables</li> <li>▪ Perform acceptance testing activities</li> </ul>
<b>Project Management Team</b>	<ul style="list-style-type: none"> <li>▪ Monitor the overall project strategy, plans, and schedules</li> <li>▪ Liaise with business stakeholder groups regarding deployment</li> <li>▪ Provide leadership on organizational change management</li> <li>▪ Provide direction on communications and training strategies</li> <li>▪ Review and approve Deliverables as applicable</li> <li>▪ Ensure continued business commitment to the project</li> <li>▪ Provide decisions and resolution of escalated issues</li> <li>▪ Review and approve Deliverables as applicable</li> <li>▪ Obtain resolution of issues required to continue project activities, when escalated</li> <li>▪ Recommend approval of project scope, schedule and/or budget</li> <li>▪ Participate in on-going project communication processes.</li> <li>▪ Ensure the project outcomes meet the overall objectives of the initiative.</li> <li>▪ Provide guidance to Delivery Manager on business stakeholder relationships.</li> <li>▪ Provide guidance to Delivery Manager on issue resolution.</li> </ul>
<b>Vendor Team</b>	<ul style="list-style-type: none"> <li>▪ Complete the tasks in the project work schedule</li> <li>▪ Ensure the appropriate GOA and Alberta Health standards and guidelines are followed</li> <li>▪ Keep the Project Manager apprised of task status and issues, including early identification of risks and associated mitigation strategies</li> <li>▪ Produce the Deliverables and work products</li> <li>▪ Provide training to stakeholders as indicated in approved training plan</li> <li>▪ Conduct testing according to approved Testing Strategy and Test Plan and provide guidance and support to the Business Team during User Acceptance Testing</li> </ul>

Role	Responsibilities
<b>IM/IT Advisory Team</b>	<ul style="list-style-type: none"> <li>▪ Perform quality assurance and control on architecture related activities</li> <li>▪ Participate in project as the Privacy Advisory representative</li> <li>▪ Facilitate development and maintenance of Privacy Impact Assessment and/or addenda as appropriate</li> <li>▪ Perform quality assurance on testing related activities including project management related plans and deliverables</li> <li>▪ Perform quality assurance and control on related activities</li> <li>▪ Facilitate resolution of related issues</li> <li>▪ Review and approve Deliverables as applicable</li> <li>▪ Provide guidance on processes, standards and requirements</li> <li>▪ Provide lab interface download</li> <li>▪ Review and approve applicable project Deliverables for compliance to privacy requirements</li> <li>▪ Verify and approve the Vendor meets or exceeds the Department's legislative security requirements</li> </ul>

### 3.1.9 **Key Stakeholders:**

The Project stakeholders include, but are not limited to:

Department of Health, Pharmaceuticals and Supplementary Benefits

- Alberta Organ and Tissue Donation Program
- Health Information Systems Division

AHS:

- Organ Donation Organizations
- Tissue Banks
- Information Technology and Systems Division

## 3.2 **Project Requirements**

### 3.2.1 **Solution Requirements**

The Province requires the Vendor to provide a SaaS-based Solution that aligns with industry standards, is easy to use, robust, flexible and scalable, and will meet its current and future requirements. The Solution requirements are outlined in Appendix C- *Solution Functionality and Non-Functional Requirements*.

### **3.2.2 Architecture and Standards**

The proposed Solution must conform to the current Province server, technology and workstation configuration as set out in Appendix J – *Target Technology Platform*.

### **3.2.3 Implementation**

The Vendor shall provide the implementation services for the Solution.

The Vendor shall describe the implementation services and how the Vendor will ensure implementation is completed as soon as possible, preferably no later than December 1, 2017.

### **3.2.4 Interface**

This section is intentionally left blank.

### **3.2.5 Project Status Reporting**

The Vendor will be required to submit bi-weekly written Project status reports to the Department via Alberta Health Microsoft Project Server. These status reports should outline:

- Overall summarization of the Project progress
- Services provided
- Milestones and Deliverables completed
- Key performance indicators
- Remaining Deliverables, progress, and expected delivery on each
- Issues, risks, and concerns affecting specific Project Deliverables or any other aspect of the Project

The Vendor will be required to conduct weekly meetings of Project status with the Department of Health, either in person or via conference call. During these meetings any existing Solution issues will be discussed and prioritized.

### **3.2.6 Department Supplied Resources**

The Department will provide meeting space in Edmonton, Alberta for all in-person meetings with the Vendor's resources. Other than that, the Vendor will be responsible for providing everything else to conduct the activities of the Project.

### **3.2.7 Service Levels**

Vendors will be required to ensure the Solution meets or exceeds the Service Measures outlined in APPENDIX K – *Service Level Agreement*.

### **3.2.8 Security**

The Vendor must work with the Province to ensure the Vendor has implemented procedures that meet or exceed the security requirements required by the Province in the High Level Security Assessment. The Vendor's engagement in the Project must protect the security of the Province's systems and data at all times, including ensuring the integrity of the data, both stored and in transit, as well as documenting conversion processes and retaining appropriate audit evidence to meet external auditor requirements. The Vendor must meet the requirements in the High Level Security Assessment within thirty (30) Business Days of entering into the Contract and maintain these security requirements over the term of the Contract. The High Level Security Assessment is included in APPENDIX L-*High Level Security Assessment*

### **3.2.9 Conversion/Transition**

This section intentionally left blank.

### **3.2.10 Acceptance Testing**

The Province will conduct User Acceptance Testing of the Solution subsequent to Vendor installation of Solution. The Vendor must provide the following support for UAT:

- Create test data
- Provide troubleshooting and technical support
- Resolve and correct issues and defects

### **3.2.11 Documentation**

The Vendor shall provide the following documents to the Department within the specified timeframe:

	Document	Description	When
1	Administrator documentation for the Solution	Provide documentation that will support administrative users of the Solution.	Within 30 days of entering into the Contract
2	Technical Documentation for the Solution (e.g., Client workstation requirement)	Provide documentation that will support client workstation configuration for the Solution.	Within 30 days of entering into the Contract

3	User Manual	<p>Provide end-user documentation with operating instructions for the Solution user interface.</p> <p>Prepare the User Manual with the checklist provided in Appendix S – <i>User Manual Checklist</i></p>	Within 30 days of entering into the Contract
4	Personal Privacy Protection Plan	Provide a detailed plan describing the security measures to be implemented to ensure the protection of personal privacy. See further details in RFP Section 3.2.13(b).	Within 30 days of entering into the Contract
5	Physical Database Specifications	<p>Provide data model documentation including physical data models, sizing, database configuration, integrity.</p> <p>Document the target database design decisions such as surrogate keys, foreign keys, performance considerations.</p> <p>Provide all target database creation scripts and programs. While the solution is not being hosted on Alberta Health infrastructure, a copy of the data will be.</p> <p>Prepare the physical database specification with the guidelines laid out in Appendix T - <i>Physical Data View Specifications</i></p>	Prior to Solution going live



6	Lessons Learned Report	Provide a Lesson Learned document that captures lessons learned throughout the project.  Prepare the “Lessons Learn Report” with the template provided in Appendix U – <i>Lesson Learned Report Template</i>	Within 60 days after the Solution going live
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The Vendor shall assist the Department to create the following documents within the specified timeframe:

	Document	Description	When
1.	Master Test Plan	Assist the Department to create a Master Test Plan that documents the test approach including test phases and objectives, test schedule, roles/responsibilities, assumptions/constraints, test dependencies and deployment management.	Within 90 days of entering into the Contract
2.	Privacy Impact Assessment	Assist the Department to document the Solution’s privacy and security features.	Within 90 days of entering into the Contract

### **3.2.12 User Training**

The Vendor shall provide training to Users and Solution Administrators from the Department and Alberta Health Services. The training shall be

- designed in a “Train the Trainer” model that would ensure staff self-sufficiency
- delivered by a combination of classroom and live webinar formats. The latter shall be recorded and made available to the Department and AHS
- at least two (2) sessions provided in or near Edmonton and at least two (2) session in or near Calgary.
- completed no later than 20 days prior to Solution going live

The Department will be responsible for providing training space and, if necessary, equipment to enable the Vendor to conduct the training. The Department will also provide food and beverage if required.

### **3.2.13 FOIP and HIA**

- a) The Vendor acknowledges that:
  - i. The Privacy Acts, apply to all information and records relating to, or obtained, generated, created, collected or provided under, the RFP or the Contract and which are in the custody or control of Her Majesty. The Privacy Acts allow any person a right of access to records in Her Majesty's custody or control, subject to limited and specific exceptions as set out in the Privacy Acts;
  - ii. The Privacy Acts impose obligations on Her Majesty, and through the RFP and Contract on the Vendor, to protect the privacy of individuals to whom information relates. The Vendor shall protect the confidentiality and privacy of any individual's Personal Information accessible to the Vendor or collected by the Vendor pursuant to the RFP or the Contract;
  - iii. The Vendor, if it considers portions of its Proposal to be confidential, shall identify those parts of its Proposal to Her Majesty considered to be confidential and what harm could reasonably be expected from disclosure. Her Majesty does not warrant that this identification will preclude disclosure under the Privacy Acts;
  - iv. Materials produced by the Vendor, in connection with or pursuant to the RFP or the Contract, which are the property of Her Majesty pursuant to the RFP or the Contract, could be considered records under the control of a public body and could therefore also be subject to the Privacy Acts before delivery to Her Majesty. As such, the Vendor must conduct itself to a standard consistent with the Privacy Acts in relation to such Materials.
  - v. For the records and information obtained or possessed by the Vendor in connection with or pursuant to the RFP or the Contract, and which are in the custody or control of Her Majesty, the Vendor must conduct itself to a standard consistent with the Privacy Acts when providing the services or carrying out the duties or other obligations of the Vendor under the RFP or the Contract.
- b) Prior to the start of the Services by the successful Vendor, the Vendor must provide a detailed plan describing the security measures to be implemented to ensure the protection of personal privacy and to ensure that only those employees, sub-contractor and agents of the Vendor who are required to have access to, or to collect, Personal Information for the purposes of providing the Services and Materials required under the Contract, are permitted access to that Personal Information. The plan shall address the following requirements, as appropriate for the Proposal:
  - i. manner of collection

- ii. notification of collection purposes
  - iii. assurance of accuracy
  - iv. plans and controls over data matching and linkage
  - v. controls over uses and consistent uses
  - vi. controls over disclosure of Personal Information
  - vii. provision for retention and disposal of Personal Information
  - viii. protection of Personal Information from unauthorized access
  - ix. collection, use, disclosure or disposal
- c) The purpose for collecting Personal Information for the RFP is to enable Her Majesty to ensure the accuracy and reliability of the information, to evaluate the Proposal, and for other related program purposes of Her Majesty. Authority for this collection is the *Government Organization Act*, as amended from time to time. The Vendor may contact the Contracting Manager identified in the RFP regarding any questions about collection of information pursuant to the RFP

#### **3.2.14 Maintenance and Solution Support**

The Vendor shall provide ongoing technical support for the Solution throughout the term of the Contract. In addition to the service measures detailed in Appendix K – Service Level Agreement, the Vendor shall notify the Department directly via email or telephone when the Solution is not available (either planned or unplanned) for general usage, and notify, via email, all approved Users of any outage planned for the Solution.

Any and all interactions between the Vendor and the Department are to be held within Business Hours. Any requests by the Vendor for interactions outside of Business Hours must be requested a minimum of two Business Days in advance and will be subject to approval by the Department.

Key Vendor resources must be available for weekly meetings with the Department, either in person or via teleconference. These meetings will be held during Business Hours.

The Vendor shall adhere to the issue management process as detailed in Appendix M – *Issues Management Process*.

#### **3.2.15 Change Order Process**

The Vendor shall follow the Change Order process as outlined in Appendix N – *Contract Amendment and Change Order Process* when changes to the Solution or the Services are required.

#### **3.2.16 Other Services**

The Vendor will:

- Provide project management oversight of Vendor resources, tasks, and milestones
- Review and verify business functional and non-functional requirements
- Facilitate design workshops to assess configuration requirements
- Participate in an annual cumulative service measure review meeting
- Configure the Solution to meet business requirements
- Support testing as per the Alberta Health Enterprise Testing Strategy as detailed in Appendix O - *Alberta Health Enterprise Testing Strategy*
- Capture lessons learned and produce a lessons learned log work product. See Appendix P – *Lessons Learned Process*

### **3.2.17 Deliverable Review Process**

Vendor will submit each deliverable in draft format ready for final review. The Department will review and provide written summary of issues and corrections to be made to each Deliverable within 7 Business Days of its receipt. The deliverable review cycle will repeat until the Deliverable is ready for acceptance unless otherwise agreed to by the Department.

### **3.2.18 Deliverable Acceptance Process**

Deliverables will be subject to the Deliverable Acceptance Process. Each Deliverable shall be subject to review and approval by Alberta Health reviewers and approvers. Refer to Appendix Q for Deliverable Acceptance Criteria and Appendix R for the Deliverable Acceptance Process.

## **4.0 EVALUATION CRITERIA**

The RFP evaluation criteria will be distributed within the following rating categories.

<b>Evaluation Categories</b>	<b>Evaluation Category Weighting</b>
• Corporate	2.5%
• People	2.5%
• Products	65%
• Service Delivery	10%
• Pricing	20%
Total	100%

Each evaluation category referenced above has been given a weight to reflect its relative importance in the evaluation. For example, the category that is most important in the evaluation is given the highest number (65%). The category(s) that are least important in the evaluation are given a lowest number (2.5%). The total value of the assigned weights is 100.

The following RFP requirements will also be evaluated, but not scored:

- acceptance of RFP terms and conditions
- acceptance of RFP Administration Terms and Conditions
- response to Appendix F – Cloud Security Questionnaire

Proposals will be evaluated and scored based on quality of response to the requirements of this RFP. Selection of the preferred Vendor will be based on the highest score.

Subject to the requirements of FOIP, the evaluations shall be confidential, and not released to any party.

## **5.0 PROPOSAL CONTENT GUIDELINES**

### **5.1 Proposal Format**

To facilitate ease of evaluation by the Evaluation Team, and to ensure each Proposal receives full consideration, Proposals should be organized in the following format using the section titles and sequence listed below:

- a. Table of Contents
- b. Vendor Profile
- c. RFP Requirements [Section 5.2.3 1 – 5.2.3.6]
- d. RFP Administration Terms and Conditions
- e. Contract Provisions
- f. Appendices

### **5.2 Proposal Content**

The requirements described with a “must” in this section are required to be provided in the Proposal. It is highly desirable that Proposals also respond to “should” requirements in this section. The Proposal response to all mandatory and desirable requirements in this section will be utilized in evaluating each Proposal.

Vendors proposing an alternative to any RFP requirement must clearly substantiate the merit of the alternative. Proposed alternatives must substantially meet the fundamental intent of the requirement. The acceptability of the alternative will be determined by the Evaluation Team.

#### **5.2.1 Proposal Submission**

Submission of the Proposal shall be deemed agreement by the Vendor that if awarded the Contract, the Vendor will deliver the Materials and/or perform the Services in accordance with the Contract.

## **5.2.2 Vendor Profile**

### **5.2.2.1 The Proposal must include:**

- a. a brief introduction of the Vendor, identifying the members of the Consortium (if applicable) and the Prime Vendor who will be the Consortium's contact with the Department
- b. the full legal name of the Vendor. In the case of Consortium Proposals, the full legal name of the Prime Vendor and each Consortium member must be provided
- c. the location of the Vendor's head office and service centres. For Consortium Proposals, head office and service centre locations must be provided for each Consortium member
- d. details of any and all subcontracting arrangements proposed by the Vendor

The Proposal should include:

- e. a Vendor contact for all questions and clarifications arising from the Proposal. The contact information should include the person's title, address including email, telephone and facsimile number
- f. a Vendor contact authorized to participate in Contract finalization. The contact information should include the person's title, address including email, telephone and facsimile number
- g. Corporate references for at least 3 projects undertaken by the Vendor that are similar in scope and complexity to the project described in this RFP. References should include the name of the client organization, official contact person for the client organization including street address, email address and telephone number. If the Proposal does not include these references the Vendor must provide them within 2 Business Days of a request by the Province. Her Majesty may contact references, including references other than those submitted by the Vendor, without prior notice to the Vendor. The Proposal may be rejected if, in the opinion of Her Majesty, the Vendor receives unsatisfactory references.

### **5.2.2.2 In the case of Consortium Proposals, the Proposal must also:**

- a. describe the role of the Prime Vendor and each Consortium member;
- b. identify management, ownership, financial and legal relationships between Consortium members
- c. demonstrate a Consortium management approach that will ensure, for the duration of the Contract, clear lines of communication and delivery of Services
- d. demonstrate that Consortium members are qualified to perform the tasks they have been proposed to perform.

Where the information requested above of a Vendor or a Prime Vendor is not included with the Proposal, the information must be provided within 2 Business Days of a request by the Province to do so.

### **5.2.3 RFP Requirements**

#### **5.2.3.1 Product**

##### **a. Mandatory Requirements**

The Proposal must not only provide a response to but also demonstrate it meets the mandatory requirements as set out in Appendix C – *Solution Functionality and Non-Functional Requirements*.

##### **b. Desirable Requirements**

The Proposal should not only provide a response to but also demonstrate it meets or exceeds the desirable requirements as set out in Appendix C – *Solution Functionality and Non-Functional Requirements*.

#### **5.2.3.2 Corporate**

##### **a. Mandatory Requirements**

The Proposal must not only provide a response to but also demonstrate it meets or exceeds the mandatory requirements as set out in Appendix D – *Mandatory and Desirable Provisions - Corporate*.

Additional points will be awarded where the Vendor exceeds the minimum mandatory requirements.

##### **b. Desirable Requirements**

The Proposal should not only provide a response to but also demonstrate it meets or exceeds the desirable requirements as set out in Appendix D – *Mandatory and Desirable Provisions - Corporate*.

#### **5.2.3.3 People**

##### **a. Mandatory Requirements**

The Proposal must not only provide a response to but also demonstrate it meets or exceeds the mandatory requirements as set out in Appendix E –*Experience Summary Sheet – People*.

Additional points will be awarded where the Vendor exceeds the minimum mandatory requirements.

**b. Desirable Requirements**

The Proposal should not only provide a response to but also demonstrate it meets or exceeds the desirable requirements as set out in in Appendix E – *Experience Summary Sheet - People*

**5.2.3.4 Security**

The Proposal must provide a response to the Security Questionnaire as set out in Appendix F – *Cloud Security Questionnaire*.

**5.2.3.5 Service Delivery**

The Proposal must provide a response to the Service Delivery Approach as set out in Appendix G - *Service Delivery Approach*.

**5.2.3.6 Pricing**

Vendors must use the Pricing Form in Appendix B or a similar representation of the same information to submit their pricing for the Services and Materials described in this RFP.

**5.2.4 RFP Administration Terms and Conditions**

Vendors by submitting a Proposal are deemed to have accepted the RFP Administration Terms and Conditions as outlined in Appendix V.

**5.2.5 Standard Contract Provisions**

Except as otherwise noted in Appendix A, the acceptance of the Contract Provisions is desirable. Unless the Proposal contains an express provision to the contrary, Vendors by submitting a Proposal are deemed to have accepted each of the provisions of the Contract exactly as drafted (including any Schedules) attached as Appendix A.

Where the Vendor responds “Not Met” to a Contract provision identified as “desirable”, the Vendor should provide in their Proposal the Vendor’s position



on the provision, i.e., the wording that the Vendor prefers to be included in the Contract.

Where the Vendor responds “Not Met” to a Contract provision identified as “mandatory”, the Vendor must provide in their Proposal the Vendor’s final position on the provision, i.e., the wording that the Vendor requires for the Vendor to enter into a contract. Her Majesty will deem any alternative wording, including suggested, recommended, or proposed wording, as reflecting the Vendor’s final position on the provision. Alternative wording should be considered carefully since alternative wording for mandatory contract provisions not meeting the fundamental intent of the provision will result in rejection of the Proposal. Her Majesty will determine whether the alternative wording meets the fundamental intent of the provision.

#### **5.2.6 Vendor’s Proposed Contract Provisions**

Any proposed SaaS agreement provisions that the Vendor will require should be included in the Proposal or must be provided to the Province within 3 Business Days of a request. In the case of conflicts, discrepancies, errors or omissions among the proposed SaaS provisions and the Vendor’s response to RFP section 5.2.5 (Standard Contract Provisions) in its Proposal, the Vendor’s response to RFP section 5.2.5 (Standard Contract Provisions) in its Proposal shall take precedence and govern.

#### **5.2.7 Appendices**

If the Vendor wishes to include any other material not specifically requested by this RFP, it may do so by including additional appendices in the Proposal.