

**STAR SYSTEM
REQUEST FOR PROPOSAL (RFP)**

RFP CODE: **STAR LMS**

RFP ISSUE DATE: **April 25, 2016**

RFP CLOSING DATE: **May 20, 2016**

RFP CLOSING TIME: **17:00 PST**

RECEIPT CONFIRMATION
DUE DATE: **April 29, 2016**

COPIES: **Return 2 copies and 1 digital copy**

AUTHORIZED CONTACT:
Name: **Maureen Kaake, Project Manager**

Telephone: **604.733.4682**

Fax: **604.733.4692**

Email: **maureenk@actsafe.ca**

**ALL INQUIRIES MUST BE SUBMITTED IN WRITING and ONLY TO
THE AUTHORIZED CONTACT PERSON**

Author: Maureen Kaake, Project Manager

Version: 1.0

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SECTION 1: INTRODUCTION

1.1 ACTSAFE SAFETY ASSOCIATION

Mission: Serving British Columbia’s motion picture and performing arts sectors by providing health and safety training, education and resources for employers and workers.

Actsafe is seeking to improve the delivery of safety awareness education programs, become the central body for safety records data management, and expand Actsafe’s presence and visibility in the motion picture and performing arts sectors. In particular, Actsafe wishes to:

1) Provide Industry Specific Safety Awareness Education Programs

Actsafe is seeking to implement an IT platform that will integrate its training services with an industry wide training records database to deliver an expanded offering of industry specific safety awareness education programs to support employer health and safety programs in all sectors that Actsafe serves.

Actsafe is seeking to do this by:

- Developing an enterprise level Learning Management System (LMS) that supports Actsafe’s training systems, including both online and instructor led training.
- Developing integration support to enable connection to 3rd party training and course delivery.

2) Deliver Excellence in Safety Records Data Keeping

Actsafe is required by its stakeholders to implement and operate a reliable and accessible safety training records database. In order to fulfil this requirement, Actsafe must replace its out-dated database “Passport” with an integrated information system that facilitates the transfer of safety training records between employers and workers without compromising security, data integrity or privacy.

The integrated information system must serve as a comprehensive safety training records database, which will become the definitive source for employers, labour organizations and regulators to verify safety training records.

3) Expand Presence & Visibility

Actsafe is seeking to improve the user experience with Actsafe’s online resources. In particular, Actsafe is seeking to:

- Improve the content management IT system to be more intuitive and structured to facilitate users finding the information they need. Information on the website is to be organized and presented based on user experience feedback.
- Adopt a mobile first approach to digital resource development and existing material updates. The industries served by Actsafe are highly mobile at all levels; from organizational structure to worker demographics, Actsafe seeks to ensure resources are accessible to everyone, everywhere, all the time.

- Make Actsafes web portal the gateway to all Actsafes other resources, linking to training and records keeping IT systems. All the resources stakeholders need at one site with one log in.

ACTSAFE SAFETY ASSOCIATION is looking for total cost considerations, service & support coverage, and additional value added services. The company encourages all suppliers to be creative and innovative in their response. Suppliers should include information that the supplier may consider being additional benefit(s) for evaluation of the RFP, other than the pricing submitted. Proposals should be complete, concise, and self-explanatory as to intent.

For more information please visit our website at www.actsafe.ca.

1.2 EXECUTIVE SUMMARY

ACTSAFE SAFETY ASSOCIATION is an industry association that is replacing an outdated database with an enterprise level learning management system. The new system will serve as the portal to all of Actsafes on-line resources in alignment with Actsafes other priorities of training and records keeping. Existing and new resources will be updated and developed with a “mobile first” philosophy; with formats that are matched to the trends and demographics of the industries and communities that use them.

The key to the success of this strategic priority will be creating the necessary user accessibility while maintaining the highest possible level of data integrity, security and privacy.

Qualified and experienced suppliers encouraged to respond to this RFP are those Suppliers that have:

- Recent proven and successful implementation experience of their LMS solution,
- Successful implementation experience of a similar to larger size organization,
- Ability to commit to deliver a fully implemented solution by December 31st, 2016, and
- Are able to provide their solution in a Software-as-a-Service ‘SaaS’ environment.

SECTION 2: RFP TERMS AND CONDITIONS

2.1 GENERAL INSTRUCTIONS

1. ACTSAFE SAFETY ASSOCIATION is inviting proposals for the supply of an LMS in accordance with the specifications and requirements set out herein.
2. Proposals must be received, no later than 17 Hours 00, Pacific Standard Time on May 20, 2016 (the "Closing") at:

DELIVER IN PERSON, COURIER, OR MAIL YOUR PROPOSAL DIRECTLY TO:

ACTSAFE SAFETY ASSOCIATION
ATTN: MAUREEN KAAKE
#215 – 750 Hamilton Street, Vancouver, BC V6B 2R5

USING LEGIBLE PRINT, CLEARLY LABEL BOTH THE PROPOSAL AND PACKAGE WITH:

ATTN: Maureen Kaake, Project Manager
RFP CODE: STAR LMS
YOUR COMPANY NAME:

3. Proposals should be delivered in a sealed envelope or package clearly marked on the outside with the name and address of the Supplier and the RFP Code. It is the supplier's sole responsibility to ensure their proposal is received when, where and how it is specified in the RFP. ACTSAFE SAFETY ASSOCIATION is not responsible for lost, misplaced or incorrectly delivered proposals. All proposals will be date and time stamped. For hand delivered proposals, ACTSAFE SAFETY ASSOCIATION will supply a receipt if requested. Include 2 printed copies of your proposal.
4. The supplier's proposal must be signed by a person authorized to sign on behalf of the supplier and to legally bind the supplier to statements made in the proposal. Proposals received after the closing will not be accepted and proposals that are non-compliant may not be accepted for consideration. The decision to accept or reject such proposal for consideration will be made by ACTSAFE SAFETY ASSOCIATION in its sole discretion. The supplier's proposal may be returned at the supplier's expense with a non-compliance letter.

2.2 WAIVER OF NON-COMPLIANCE

Notwithstanding anything to the contrary in this RFP, if a supplier fails to complete its proposal in compliance with this RFP, ACTSAFE SAFETY ASSOCIATION in its sole discretion may waive such non-compliance, seek clarification or additional information from the supplier, and consider and treat the proposal as a conforming proposal even if any such non-conformance or failure to comply with the requirements of this RFP would otherwise render the proposal null and void. Without limiting the generality of the foregoing, ACTSAFE SAFETY ASSOCIATION reserves the right to accept or reject any proposal which is incomplete, obscure or irregular, which contains exceptions and variations, which is submitted after closing, is unsigned, or which omits any matter that is required to be submitted.

2.3 RECEIPT CONFIRMATION FORM

Suppliers are advised to complete and return the **Receipt Confirmation Form**, found in Appendix A by email to the Authorized Contact no later than April 29, 2016. All subsequent information regarding this RFP including addendum and/or clarifications will be directed only to those suppliers who return the form. ACTSAFE SAFETY ASSOCIATION will distribute subsequent information (if applicable) to the supplier by the method and to the contact person as indicated on the form.

2.4 NO PUBLIC OPENING

There will be no public opening of the proposals received. ACTSAFE SAFETY ASSOCIATION will open proposals privately after the Closing time specified for the receipt of proposals. No public announcement of the contents of any proposal will be made at any time.

2.5 OWNERSHIP OF PROPOSALS

All proposals submitted to ACTSAFE SAFETY ASSOCIATION become the property of ACTSAFE SAFETY ASSOCIATION. They will be received and held by ACTSAFE SAFETY ASSOCIATION subject to the provisions of the *Freedom of Information and Protection of Privacy Act* (FOIPPA).

2.6 OPEN FOR ACCEPTANCE

The supplier's offer shall remain open for acceptance for 60 business days from the date of Closing. In the event that ACTSAFE SAFETY ASSOCIATION requires more time than the 60 business days as identified, the additional time period will be requested from all suppliers.

2.7 AMENDMENTS AND WITHDRAWALS

No proposal or price quotation forming part of a proposal shall be amended or withdrawn after the closing. Negligence on the part of the supplier confers no right for the amendment or withdrawal of a proposal after the closing. In the event of pricing extension errors, the unit price will apply. In the event of a numerical discrepancy or error in a proposal, the written number will apply. Proposals may be amended or

withdrawn upon written request before the closing. Telephone communication will not be accepted.

2.8 AUTHORIZED CONTACT

1. All inquiries related to this RFP must be directed to the individual identified below. Any substantive questions are to be submitted in writing and where in ACTSAFE SAFETY ASSOCIATION's opinion it is warranted, a formal written response will be provided to all suppliers:

Name: Maureen Kaake

Email: maureenk@actsafe.ca

2. Any supplier that circumvents this process and initiates any form of discussion with any other member of ACTSAFE SAFETY ASSOCIATION, branch society or agency staff, for any reason whatsoever, will be automatically eliminated from consideration.

2.9 ALTERNATIVE OR VALUE ADDED SOLUTIONS

All suppliers may expand their proposals to detail additional features or performance characteristics or value added options available beyond those requested, together with pricing information, provided the product or service offered at least meets the required level of technical specifications listed. Any alternative or value added solutions that are being offered should be in the same format, clearly identified and separated within the main proposal.

2.10 PAYMENT AND DELIVERY TERMS

Unless otherwise agreed to by ACTSAFE SAFETY ASSOCIATION, ACTSAFE SAFETY ASSOCIATION's standard payment terms are net 30 days. All pricing, fees and costs associated with this RFP shall be in Canadian funds, inclusive of all taxes, PST and/or GST. Duty and brokerage costs (if any) are to be included in the unit prices. State payment terms in the proposal. Describe any discounts for early payment, Electronic Data Interchange or Electronic Funds Transfer transactions. Delivery will be prepaid FOB the ACTSAFE SAFETY ASSOCIATION receiving dock and will include delivery, packaging and unloading costs.

2.11 BIDDER'S MEETING

ACTSAFE SAFETY ASSOCIATION may at its option determine that all potential suppliers may be required to attend a Bidder's meeting to clarify the requirements as written in the RFP. ACTSAFE SAFETY ASSOCIATION will advise Suppliers when the meetings will occur. Only Suppliers submitting Receipt Confirmation Forms will be notified of the time and place of any meeting.

2.12 QUESTIONS AND INQUIRIES

1. All questions and inquiries concerning this RFP including questions related to discrepancies, omissions, ambiguities and conflicts must be directed, in writing, to the RFP contact person identified no later than 14 days prior to the Closing.
2. To ensure consistency and quality of information, answers to questions relevant to the interpretation of this RFP will be sent to all Suppliers from whom ACTSAFE SAFETY ASSOCIATION has received the **Receipt Confirmation Form** via email without revealing the source of the enquiries. Responses may or may not be in the form of an addendum. The decision to issue or not issue an addendum is entirely at the sole discretion of ACTSAFE SAFETY ASSOCIATION. Information obtained from any other source is not official and should not be relied upon.
3. The Supplier has the responsibility, at all times, to notify the designated contact person in writing of any ambiguity, divergence, error, omission, oversight or contradiction contained in the RFP as it is discovered, or to request any instruction, decision, or direction which may be required to prepare the proposal.
4. ACTSAFE SAFETY ASSOCIATION reserves the right to request clarification of the contents of any proposal. ACTSAFE SAFETY ASSOCIATION may require Suppliers to submit supplementary documentation clarifying any matters contained in their proposals and may seek the Supplier's acknowledgement of that interpretation. This is not an opportunity for the Supplier to submit new information modifying its proposal. Notwithstanding the foregoing ACTSAFE SAFETY ASSOCIATION is not obliged to seek clarification of any aspect of a proposal.

2.13 RFP REVISIONS

The RFP may be amended or revised by the ACTSAFE SAFETY ASSOCIATION in its sole discretion at any time during the RFP process and until such time, if any, as a Contract is entered into with a preferred Supplier. If it becomes necessary to amend or revise any part of this RFP, the amendments or revisions will be provided in writing to those who have submitted the Receipt Confirmation Form. It is the sole responsibility of the Supplier, prior to the Closing date, to ensure they have received all amendments or revisions pertaining to the RFP.

2.14 SUPPLIER'S EXPENSES

Suppliers are solely responsible for their own costs and expenses in relation to this RFP and the award of the proposed Contract including preparing and submitting a proposal, attending interviews or meetings with ACTSAFE SAFETY ASSOCIATION during the evaluation of the proposal, site tours, and negotiation, finalization and execution of any contract with ACTSAFE SAFETY ASSOCIATION. ACTSAFE SAFETY ASSOCIATION is not liable to pay such costs and expenses or to reimburse or to compensate a Supplier under any circumstance and ACTSAFE SAFETY ASSOCIATION has no obligation to purchase or acquire any of the goods or services included in any proposal.

2.15 LIABILITY FOR ERRORS

ACTSAFE SAFETY ASSOCIATION and its employees and agents shall not be held liable or accountable for any error or omission in any part of this RFP or response to Supplier questions. While the ACTSAFE SAFETY ASSOCIATION, and/or its employees and agents, have made efforts to ensure an accurate representation of information in this RFP, the information contained in the RFP is supplied solely as a guideline for Suppliers. The information is not guaranteed or warranted to be accurate by ACTSAFE SAFETY ASSOCIATION, and/or its employees or agents, nor is it necessarily comprehensive or exhaustive. Nothing in this RFP is intended to relieve Suppliers from the responsibility of conducting their own investigations and research and forming their own opinions and conclusions with respect to the matters addressed in this RFP. Suppliers will be solely responsible to ensure their proposal meets all requirements of the RFP, to advise ACTSAFE SAFETY ASSOCIATION immediately of any apparent discrepancies or errors in the RFP, and to request clarification if in doubt concerning the meaning or intent of anything in the RFP.

2.16 CONFIDENTIALITY

Information pertaining to ACTSAFE SAFETY ASSOCIATION obtained by the Supplier, its employees and agents as a result of its participation in relation to this RFP, is proprietary and confidential. The data provided in this RFP is for the sole purpose of assisting the Supplier in the preparation of a proposal to ACTSAFE SAFETY ASSOCIATION. The data must not be copied or disclosed by the Supplier except for the purpose of responding to the RFP.

2.17 FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT (FOIPPA)

ACTSAFE SAFETY ASSOCIATION is subject to legislation governing the protection of personal privacy and as such, ACTSAFE SAFETY ASSOCIATION records are subject to access under this Act. This Act governs the collection, use, retention, security and disclosure of personal information managed by public organizations. The Act also applies to all electronic information accessed or returned by the Suppliers. Should documents submitted contain protected, proprietary or confidential information, identify the specific issue or information and provide supporting reasons why ACTSAFE SAFETY ASSOCIATION should not release this information if requested by a FOIPPA inquiry.

2.18 CONFLICT OF INTEREST

Proposals will not be evaluated if the Supplier's current or past corporate or other interests are, in the opinion of ACTSAFE SAFETY ASSOCIATION, deemed to be a conflict of interest in connection with this RFP or the activities or mandate of its facilities. ACTSAFE SAFETY ASSOCIATION reserves the right to disqualify and reject a proposal in whole or in part where the Supplier or directors, officers, shareholders or any other person associated with the Supplier has a claim or has initiated a claim or legal proceeding against ACTSAFE SAFETY ASSOCIATION or any of its branch societies or

agencies or against whom ACTSAFE SAFETY ASSOCIATION or any of its branch societies or agencies has a claim or has instituted a legal proceeding with respect to any previous contracts, tenders or business transactions.

2.19 RFP CANCELLATION

ACTSAFE SAFETY ASSOCIATION is not bound to accept any proposal and reserves the right in its sole and absolute discretion to postpone or cancel this RFP at any time for any reason. Further and without limiting the foregoing, ACTSAFE SAFETY ASSOCIATION will not be bound to accept the lowest bid and reserves the right to accept or reject any proposal in whole or in part, to discuss with any Supplier different or additional items and terms to those described in this RFP or received in any proposal, or to amend or modify any term of this RFP. ACTSAFE SAFETY ASSOCIATION in its sole discretion may invalidate and cancel this RFP entirely and may issue a new RFP if considered in the best interests of ACTSAFE SAFETY ASSOCIATION.

2.20 VERIFICATION

ACTSAFE SAFETY ASSOCIATION reserves the right to verify any statement or claim contained in any proposal or made subsequently in any interview or negotiation. That verification may be made by whatever means the ACTSAFE SAFETY ASSOCIATION deems appropriate and may include contacting the references provided by the Supplier. In submitting a proposal, the Supplier is deemed to consent to the ACTSAFE SAFETY ASSOCIATION verifying any information from third parties including the Supplier's bank references, and receiving additional information regarding the Supplier, its directors, officers, shareholders or owners and any other person associated with the Supplier as the ACTSAFE SAFETY ASSOCIATION may require.

2.21 LIMITATION OF LIABILITY AND INDEMNITY

1. ACTSAFE SAFETY ASSOCIATION will not be obligated or liable in any way whatsoever to a Proponent except where ACTSAFE has awarded and entered into a written Contract with that Proponent for the performance of the work contemplated by this RFP, and in which case that Contract shall govern all such obligations and liabilities. It is a fundamental condition of this RFP and the receipt and consideration of proposals by ACTSAFE SAFETY ASSOCIATION that ACTSAFE SAFETY ASSOCIATION, and its respective employees, consultants and agents, will not and shall not under any circumstances, including without limitation whether pursuant to contract, tort, statutory duty, law, equity, any actual or implied duty of fairness, or otherwise, be responsible or liable for any costs, expenses, claims, losses, damages or liabilities (collectively and individually all of the foregoing referred to as "Claims") incurred or suffered by any Proponent as a result of or related to any one or more of the RFP, the preparation, negotiation, acceptance or rejection of any conforming or non-conforming proposal, the rejection of any Proponent, or the cancellation, suspension or termination of the RFP process, and by submitting a proposal each Proponent shall be conclusively deemed to waive and release ACTSAFE SAFETY ASSOCIATION and its

employees, contractors, consultants and agents, from and against any and all such Claims.

2. ACTSAFE SAFETY ASSOCIATION is subject to the provisions of the *Financial Administration Act* and regulations made pursuant to such Act and is prohibited from granting an indemnity without obtaining prior written approval of the Minister of Finance or the Director of Risk Management Branch. Accordingly any contract which may be entered into with a preferred Proponent will not include an ACTSAFE SAFETY ASSOCIATION indemnity and such contract will provide that ACTSAFE SAFETY ASSOCIATION shall not be liable in connection with any claim by a contractor for any special, incidental, indirect or consequential loss or damage or for any claim in tort in respect of any act or omission of ACTSAFE SAFETY ASSOCIATION.
3. By submitting a proposal, the Proponent agrees that it shall not claim damages for any matter arising out of this RFP process or in preparing and submitting a proposal. The Proponent further agrees to and hereby waives any claim for damages for loss of profits if no resulting Contract is entered into with the Proponent.
4. Each Proponent shall indemnify and hold ACTSAFE SAFETY ASSOCIATION and its employees, contractors, consultants and agents, harmless from and against any and all Claims brought against them arising out of any act or omission of the Proponent or by third parties arising out of or relating to the Proponent's receipt of this RFP, or the preparation, submission and negotiation of any proposal submitted by the Proponent, where such third parties were directly or indirectly engaged by or through the Proponent in connection with any of the foregoing or where personal injury, bodily damage or property damage is caused by the negligent acts or omissions of the Proponent. Such indemnification shall survive completion of the goods or services provided under the Contract and the termination of the Contract.

2.22 SIGNED PROPOSALS

The proposal must be signed by a person authorized to sign on behalf of the Supplier and must designate the individual who is authorized to negotiate any subsequent Contract on behalf of the Supplier.

2.23 PRIVILEGE CLAUSE

ACTSAFE SAFETY ASSOCIATION will not be bound to accept the lowest or any bid and reserves the right to reject, in whole or in part, or to cancel any and all proposals, tenders and quotations.

2.24 WORKING LANGUAGE

The working language of ACTSAFE SAFETY ASSOCIATION is English and all responses to the RFP will be in English.

2.25 GOVERNING LAW

This RFP will be governed exclusively by and construed and enforced in accordance with the laws of the Province of British Columbia. The Supplier agrees to attorn to the exclusive jurisdiction of the courts of the Province of British Columbia in the event of any dispute concerning this RFP or any matters arising out of this RFP.

2.26 APPENDICES

All appendices to this RFP are deemed to be incorporated herein and form part of this RFP.

2.27 HEADINGS

The insertion of headings in this RFP is for convenience only and shall not affect the interpretation or construction thereof.

2.28 TIME OF ESSENCE

Time is of the essence, to meet current strategic plan objectives this project must be fully deployed in 2017.

SECTION 3: EVALUATION PROCESS
3.1 SUPPLIER EVALUATION AND SELECTION CRITERIA

The Evaluation Team will assess proposals against the requirements identified in the RFP. Proposals not meeting these requirements may be rejected without further consideration at the absolute discretion of the Evaluation Team. The following criteria and weightings will be applied in evaluating proposals. The Evaluation Team members will evaluate each proposal based on the information provided and will assign points per selection criteria for a total out of 100 points. ACTSAFE SAFETY ASSOCIATION reserves the right to waive any of the evaluation criteria or to modify the weightings if it is considered in the best interests of ACTSAFE SAFETY ASSOCIATION to do so. The selection criteria and weighting are as follows:

SELECTION CRITERIA CATEGORY	WEIGHT
Functional and Technical Fit	50
Supplier Ability to Deliver on Commitments	20
References	10
Pricing	10
Value Added	10

3.2 ESTIMATED TIMELINES

The following timetable outlines the anticipated schedule for the RFP and Contract process. The schedule provided is for information only. Timing and sequence of events may vary and ACTSAFE SAFETY ASSOCIATION will ultimately determine the timing and sequence of event.

EVENT	ANTICIPATED DATE
RFP Issued	April 25, 2016
RFP Receipt Confirmation Form Returned	April 29, 2016
Bidders Meeting	May 2016
Enquiries & Questions Submitted by	14 days prior to Closing
RFP Closing	May 20, 2016
Supplier Demonstrations	May 30 – June 3, 2016
Vendor Selection	June 17, 2016
Contract Negotiation	June 24, 2016

SECTION 4: PROJECT SCOPE

This project involves the selection of an enterprise level Learning Management System to replace our outdated database and that will also serve as a platform to support our other priorities; integrating with training resources and providing new ways to connect and share information with a broader group of stakeholders. The key to the success of this project will be creating the necessary user accessibility while maintaining the highest possible level of data integrity, security and privacy.

4.1 SCOPE INCLUSIONS

PROJECT DELIVERABLE NAME	DELIVERABLE DESCRIPTION
Data Transition Plan	Written plan on how to migrate current training records database to new system
Installation Standard Operating Procedures (SOP)	All SOP manuals for use by internal staff
Administration Standard Operating Procedures (SOP)	All SOP manuals for use by internal staff
Maintenance Standard Operating Procedures (SOP)	All SOP manuals for use by internal staff
User Training Manuals	All manuals for use by end users of the system (may include instruction videos FAQ's etc.)
STAR Card Printer	New card printer that can print double sided and embed holographic stamp of authenticity
LMS in a SaaS Environment	Contract to supply LMS software and ongoing support services
System Integrations	Integration with existing IT systems (e-commerce, transactional email, WordPress)
STAR Cards	Physical cards for distribution to workers

4.2 SCOPE EXCLUSIONS

PROJECT DELIVERABLE NAME	DELIVERABLE DESCRIPTION
eLearning Content	The creation or licensing of any learning content
API Integration to other LMS'	The development and maintenance costs of an API into any third party LMS platform such as CSATF, employer or union systems
Mobile App	The development of a mobile Actsafe application "App"
Actsafe Website Update	The updating of Actsafe's website

SECTION 5: PROPOSAL REQUIREMENTS

Please provide your proposals in the following format:

Supplier Proposal Section 1 – Customer Questions:

The following consists of questions that are to be addressed in the order provided within your proposal. Suppliers must provide answers to all of the questions below, referring to the number of each question.

1.1 General Questions

This section poses questions that require a detailed response from all Suppliers to better understand the Supplier's organizational fit.

1. Legal name of organization and current operating business name if different from legal name.
2. How long has the organization been in business under the name it is currently registered with at WorkSafeBC? (*if applicable*)
3. Street & mailing address of head office and local office if different, including the number of years the local office has been at this address.
4. Name, title, phone, fax and email address of primary contact person and an alternate if primary contact not available.
5. A Supplier must select and appoint a project manager for the provision of the Services. Provide the name and biography for this individual.
6. Provide a WorkSafeBC clearance letter.
7. Has there been a change of ownership of the firm during the last 3 years?
8. Briefly describe how your organization is an industry leader in the area ACTSAFE SAFETY ASSOCIATION wishes to contract for and how your organization could provide the requirements outlined in this RFP.
9. Provide and describe any past, pending or threatened civil, governmental proceeding/investigations or legal proceedings within the past 5 years which the company or its directors or officers is or was party to.
10. Do you offer any payment discounts, for example; electronic data interchange capability? If yes, indicate how the discount will be applied.

1.2 Implementation Questions

This section poses questions that require a detailed response from the Supplier to determine how well the Supplier is equipped to perform an implementation to meet the needs of the customer.

13. Provide an overview of your learning system's capabilities.
14. What features differentiate your learning system from your competitors?
15. Describe your implementation strategy and approach. Include project management, configuration management, quality management, risk management, training strategies and approaches.
16. Describe your approach for managing issues, identifying how issues will be tracked from initial identification to resolution and outlining how potential impacts are assessed.
17. Describe how scope issues and changes will be handled as they occur during the project. Include the process for review, approval and pricing by each of the Parties.
18. Describe your close out processes as they relate to sign off on deliverables, project evaluation, finalizing contractual arrangements and release of project resources.
19. Identify the Customer resources required, outlining the average number of resources required to deliver the plan. Indicate the type of resource e.g. business analyst/configuration analyst, technical analyst, trainer, project administration and management. Indicate the average length of time commitment for the resources associated with the implementation plan.
20. Propose a Supplier Project Manager for the provisioning of your services to work with and report to the Customer's Project Manager. Indicate the proposed candidate, and provide a resume and project dossier for this individual, highlighting implementation and project management experience. Indicate the number of projects this individual has managed directly.

1.3 Technical Questions

This section poses questions that require a detailed response from the Supplier to determine how well their technical, application and network architecture, and organizational support teams meet the needs of the customer.

21. To what extent does the system support open technology standards and service-oriented architecture (SOA), and provide tools for integrating with other applications and third-party providers.
22. Describe how the system integrates with other processes and/or tools.
23. Describe how backups and restores are handled.
24. Describe your customer and technical support.
25. Describe what analytics features are available for this LMS.
26. List the devices your system supports.

Supplier Proposal Section 2 – Functional and Non-Functional Requirements:

In addition, Proponents must provide answers to the Proposal Functional and Non-Functional Requirements in Appendix B, in the attached excel file. Each requirement has been given a priority code, to indicate to the Suppliers the importance of the requirement to the ACTSAFE SAFETY ASSOCIATION. The Priority codes are defined in the table below:

Priority Code	Definition	Meaning of Code
M	Mandatory	Fundamental to support the organization, e.g. critical to a process. Proponent must meet requirement in order to participate in the RFP process.
HD	Highly Desirable	Highly beneficial to support the organization, e.g. adds great value to a process.
D	Desirable	Beneficial to support the organization, e.g. adds value to a process.
NTH	Nice-To-Have	Optional, e.g. adds minimal value to a process.

Please respond to each question using the response codes in the following table to indicate how your solution satisfies the requirement:

Response Code	Definition	Meaning of Code
S	Satisfied	LMS “off-the-shelf” fully meets this requirement. May require configuration/set-up by the user. No application development or work-around is required.
W	Work-around	LMS meets this requirement through the use of a work-around. No application development is required.
CD CD6 CD12	Development	LMS does not currently meet this requirement and requires application development. Indicate stage of development: Requires custom development specific to this project. Available in a production release within 6 months. Available in a production release within 12 months.
N	Not Supported	LMS does not meet this requirement.

In the excel model, under the section Non-Functional Requirements, the Proponents are to respond indicating whether they can meet the requirement fully with a **Y** for Yes, or not with **N** for No.

Supplier Proposal Section 3 – Proposed Schedule:

Please provide a proposed schedule for the LMS implementation project, including training and a pilot implementation.

Supplier Proposal Section 4 – Pricing

Please provide your overall pricing model for the LMS implementation project.

Supplier Proposal Section 5 – References

Please provide three (3) customer references of a similar size implementation within the last 2 years. Please provide the organization’s name, a contact name and contact information.

APPENDIX A - RECEIPT CONFIRMATION FORM

This form acknowledges receipt of the STAR RFP document, and to receive any further information about this Request for Proposal please return this form to ACTSAFE.

Instructions:

A copy of this form should be emailed to the Authorized Contact no later than April 29, 2016.

Yes we will be submitting a proposal for the above-noted RFP

No we will NOT be submitting a proposal for the above-noted RFP

Authorized Signature: _____

Printed Name: _____

Send further correspondence to:

Company Name: _____

Authorized Contact: _____

Title/Position: _____

Company Address: _____

Phone Number: _____

E-Mail: _____

Fax Number: _____

APPENDIX B – FUNCTIONAL AND NON-FUNCTIONAL REQUIREMENTS

This section lists both the prioritized functional and non-functional requirements that ACTSAFE SAFETY ASSOCIATION is looking for in an LMS. Please respond to how well you meet these requirements in the attached spreadsheet using the response codes in Section 5.

FUNCTIONAL REQUIREMENTS

Learner Engagement

<i>User Registration/Management:</i>	
Ability for Worker to self-register as Learner - Self author user profile.	M
Ability for Learner to self enrol in courses - Request enrolment in one or many courses at a time.	M
Learner profiles to include learning specific information such as learning status, progress, history, courses/certificates/programs/tracks completion.	M
Ability for Learner to access to Portal to view accreditation, course enrolment, announcements.	M
Provide Learner self-service options to manage personal information.	M
Enable Learner to upload and manage certificate / identity documents.	HD
Enable Learner self-service options to print receipts, registrations and certificates.	HD
Enable Learner self-service options to view registration requests as well as past course activity.	HD
Enable Learner self service options to create and manage service requests for: <ul style="list-style-type: none"> ● Technical Support ● Administrative Support ● Teacher Support 	HD

Course Catalogue Review

Ability for users to browse course catalogue and select favourites.	NTH
Ability for users to shop and select in multiple languages	HD
Ability for users to shop and select on mobile devices.	M

Course Content Delivery

Support content delivery on a variety of devices including mobile, tablet, workstation and projection.	M
<i>Personalized Learning:</i>	
Resource Management: <ul style="list-style-type: none"> • Provide adequate self-service in a personal space where learners can store and manage their own learning materials. 	HD
Resource Management: <ul style="list-style-type: none"> • Enable learners to build personal resources and a knowledge repository with effective sharing capabilities. 	NTH
Learning Management: <ul style="list-style-type: none"> • Provide support for self-directed learning including learners: <ul style="list-style-type: none"> ○ assessing their learning needs (e.g. skills gap analysis), ○ setting learning goals, ○ monitoring learning progress (e.g. comparing progress against individual learning plans), and ○ evaluating learning outcomes by themselves. 	D
Learning Management: <ul style="list-style-type: none"> • Support for integrated analytics for providing a subset of tracking back to the Learner for self-monitoring. 	HD
Learning Management: <ul style="list-style-type: none"> • Optimization for the individual Learner without significant instructor workload. 	HD
Control of Activities: <ul style="list-style-type: none"> • Provide learners with controls to manage their learning spaces, for example, enabling a learner to initiate a discussion forum or a study group and setting permissions of access (e.g. setting the permissions for the group so that only certain other learners can join, or, making the group public). 	NTH
Personal Publishing: <ul style="list-style-type: none"> • Enable users to create and publish content, including learning reflections, learning experiences, and knowledge, using publishing tools such as blogs, wikis, or forums. 	NTH
Personal Publishing: <ul style="list-style-type: none"> • Provide support for course participants to manage badges and share badges professionally in resumes, LinkedIn, etc. 	HD

Personal Publishing: <ul style="list-style-type: none"> Support integration of learning outcomes with social tools (such as leaderboards, Twitter and Facebook). 	HD
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<i>Collaborative Learning:</i>	
Provide virtual spaces such as blogs, wikis, discussion forums, live chat and video breakout rooms for collaborative learning.	NTH
Support for Cross-course forums: <ul style="list-style-type: none"> Support general discussion and also serve as a communication channel between faculty/institution and Learners. 	NTH
Support for Ad hoc learning-focused groups: <ul style="list-style-type: none"> Enable anyone to set up groups (such as short term study groups or longer term special interest groups). Support basic group collaboration functions such as calendar, discussion, news, document sharing, etc. 	NTH
Collaborative filtering or social tagging/bookmarking: <ul style="list-style-type: none"> Support community review and recognition of instructors and learning materials (learning objects, materials, etc.), Support searching and filtering of social tagging. 	HD
Support for delivery of multilingual course content.	HDD

Employers - User Registration and Profile Management

Support creation of Employer user types.	M
Ability for users to self-register - Self-Author User profile.	M
Profile information to include general background information such as name, position and contact information.	M
Support process for Actsafe staff to verify Employer profile as legal representative of Employer before enabling Employer functions (see “Identity Verification”)	M

Employer Worker Search and Administrator

Ability for Employer users to search Worker records by: <ul style="list-style-type: none"> Skill set / qualification Availability 	M
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Ability for Employer user to contact Worker regarding opportunity.	M
Ability for Employer user to update Worker record including: <ul style="list-style-type: none"> ● Project ● Hire Date ● Qualification 	D

Instructors / Administrators - User Registration and Profile Management

Support creation of Actsafe Instructor / Administrator user types.	M
Ability for users to self-register - Self-Author User profile.	M
Profile information to include general background information such as name, position, interests and contact information.	M
Instructor profile to support ability for Learner authored reviews.	D

Course Creation and Authoring

Support flexible approaches to create and author safety training content.	HD
Include an embedded/integrated-authoring tool that is template driven, collaborative and content driven.	HD
Enables the creation / authoring of: <ul style="list-style-type: none"> - Storyboards - 3D Simulation - Courses and Modules - Podcasts 	D
Provide tools for authoring and administering course/module workflows.	HD
Enables conversion of PowerPoint / Keynote presentations	M
Ability to save and organize authored content including foldering, tagging and archiving for all course artefacts.	M
Ability to reuse previously created content.	M
Provide tools for the inclusion of rich, streaming video (avoiding the Flash format) in training content for delivery and viewing on mobile and desktop devices.	M
Provide tools for integrating online content and course delivery with physical training delivery (blended learning).	M
Provide tools for developing gamified approaches to learning.	HD

Provide support for developing micro learning modules.	HD
Provide support for developing surveys to survey learners during, or at the completion, of each module/course.	D
Support for creation of multilingual content.	HD
<i>Assessment:</i>	
Provide Support for development of Course testing / assessment including: <ul style="list-style-type: none"> • Test Building • Test Scoring • Coursework grading 	M
Support implementation of competency based training.	M
Provide support for developing pre-assessment modules for coursework to determine a user's knowledge level.	D
Provide support for management of Continuous Professional Education (CPE) - e.g. create path for training modules for learners to undertake to meet professional qualifications.	HD
Provide support for creating and awarding of badges at the completion of course modules.	HD

Course Content Delivery

<i>Instructor Led Learning:</i>	
Course Preparation: <ul style="list-style-type: none"> • Support scheduling for the delivery of online content. 	M
Course Delivery: <ul style="list-style-type: none"> • Provide support for one-on-one, group and large audience (web casting) course delivery. 	M
Resource Management: <ul style="list-style-type: none"> • Ability to record instructor led sessions. 	D
Resource Management: <ul style="list-style-type: none"> • Ability to organize and store instructor's own course artefacts. 	D

Administrator Functions - Identity Verification

Demonstrate to industry participants that only validated, authorised workers are able to access system, participate and complete online certifications.	M
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Ability to validate the worker has correct certification and training as determined by business rules.	M
Ability for Actsafe to validate that user requesting Employer access is legal representative of Employer.	M
Authorisation. <ul style="list-style-type: none"> Support for vectoring for identifying participants in online training (e.g. www.integrityadvocate.com) 	M
Verify that a worker is a member of an industry body. <ul style="list-style-type: none"> NB: Requires checking with the 2 main sector Payroll companies. Actsafe may be able to make a request of the payroll company (the companies already have an API / Confirmation engine). Or other documentation provided by worker to confirm employment within a qualified industry sector. 	HD

Administration & Scheduling

Support Multi-Organization / Multi-Tenancy structure.	M
Ability to create and manage Resource information: <ul style="list-style-type: none"> Instructors / Event Coordinators Facilities / Classrooms Equipment 	M
Ability to schedule Resources.	M
Support automation (auto notification / auto assignment of teachers in the case of absences).	HD
Support Administrative Reporting on all aspects of Course / Event Administration.	M
Support Document Management per: <ul style="list-style-type: none"> organization, resource, course. 	M
Support data import / export of Course / Event / Resource information.	M
<i>Course Catalogue Administration:</i>	
Flexibility to support creation of course catalogue content including: <ul style="list-style-type: none"> Support for multiple contributors. Support for unique branding per Course. Support for different licensing models including: Free, Trial, Open Source, Paid 	HD

Ability to schedule publishing of Course information in catalogue (including setting start and end dates).	HD
Support approval process for publishing Course information in catalogue.	HD
Ability to publish course catalogue in multiple languages	D
Ability to price products in multiple currencies.	NTH
Course Administration:	
Support for manager approval of course enrolment requests.	M
Support for waitlist management.	M
Support for user notification (e.g. Recertification notifications, Course commencement notifications) by: <ul style="list-style-type: none"> ● Email ● SMS 	M

Tracking / Progression

Support for review of Instructor led skills-gap analysis.	HD
Ability for Instructor to compare learner progress against individual learning plans.	NTH
Support Certification Management including: <ul style="list-style-type: none"> ● Tracking of user's certifications. ● Validation of user certifications against appropriate industry bodies. ● Reminders re: expiring certifications. 	M
Support employers / administrators with fast, easy search tools to find workers with specific skills / certifications.	M
Ability to track and report on course attendance, course assignment submission, course marks, certifications.	M
Ability to track and report on payments of membership dues and course fees.	M

Analytics and Reporting

Ability to gather, report and analyse data about learners and their learning activities, e.g.: <ul style="list-style-type: none"> • Course attendance, course assignment submission, course marks, certifications 	M
Ability to report on learner registration, scheduling, resources.	M
Ability to report on users (demographics, skills, injury history), <ul style="list-style-type: none"> • For example, Actsafe is considering working with Worksafe on the question list asked of injured workers so as to correlate training impact with injury. 	NTH
Ability to report on user satisfaction (e.g. survey results for individual courses).	HD
Ability to report on payments and profitability.	HD
Ad hoc reporting support (easy to use report tools).	HD
Support user access to reporting (e.g. Administrative reporting vs. individual instructor reporting).	D

NON-FUNCTIONAL REQUIREMENTS

General

The system shall support a “mobile first” approach to training, user management and administration.	M
The system shall establish a Single View of the user. E.g. a user may be a Worker with multiple employers, or, a user may be both an active learner and a subscriber to Actsafe’s monthly newsletter.	M
Ability for the solution to be scaled, duplicated or adapted to meet the demands from in Canada and potentially internationally (for example, by supporting the creation of chapters / geographic territories).	HD
Support alternative funding methods (i.e. pay per use).	HD
Support multi-tenancy to enable parent corporations to manage multiple project profiles and archive records/training verifications by project, including project start and end dates and duplication of workers that could be working for multiple projects/employers over a same period of time. Custom branded portals for unique tenants.	HD

Security & Identity Verification

Incorporate robust data security practices and protocols including, but not limited to: <ul style="list-style-type: none"> ● Two factor authentication. ● Single Sign On. ● LDAP. 	M
Identify and minimize Intellectual Property risk.	HD
Identify and minimize Data risk including: <ul style="list-style-type: none"> ● removing the risk of Actsafe system as an entry point (Trojan) to one of Actsafe's stakeholder systems (e.g. Sony). ● isolating Actsafe's database from any of the big production houses as part of cyber risk strategy. <ul style="list-style-type: none"> ○ Any API integration will have to be carefully evaluated/implemented to control risk. 	M
Deliver robust systems for managing roles and access including: <ul style="list-style-type: none"> ● Definition of user roles. ● Definition of access to functionalities and reports. 	M
The solution must adhere to the information privacy requirements of the Personal Information Protection and Electronic Documents Act (PIPEDA).	M
All data entered into the solution, along with system files, log files and any other critical database information must be securely and regularly backed up.	M
The chosen system must have efficient data recovery capabilities to enable Actsafe to recover from any situation of lost or deleted data.	M
Implement separate Production, Test and Development environments.	M
Conform to Open Source technical standards including: <ul style="list-style-type: none"> ● Development platform <ul style="list-style-type: none"> ○ Java / J2EE ○ PHP ● Database <ul style="list-style-type: none"> ○ MySQL 	HD

Integration Capabilities

Support Actsafe's integration / interface requirements for outward integration: <ul style="list-style-type: none"> Actsafe to be able to make internal resources and information (such as course materials) sharable to the public via both friendly user interface and standard application interfaces (APIs). 	M
<ul style="list-style-type: none"> Content owners to have access to flexible and configurable controls to provide lifelong learning support to learners even after their completion of a course. 	HD
Support Actsafe's integration / interface requirements for Inward integration: <ul style="list-style-type: none"> Actsafe to be able to bring external applications and resources into internal content and resources providing mashup and integration into course design. 	M
API integration to support industry standard SCORM, Experience API and TinCan API compliance to enable: <ul style="list-style-type: none"> Integration with third party tools/content (e.g. Lynda.com, DuPont, Open Sesame), Integration with third party LMS systems, Integration with payroll companies in the sector to validate union membership. 	HD
Support for integrated Business Rule and Workflow Management.	D
Provide integrated survey tools to enable automatic surveying of workers at the end of training (based on triggers).	HD
Provide integrated announcements to notify workers and employers when new courses are available or new modules have been added for a certification.	M
Allow third party training organizations to update worker files with training completed / accreditation provided by third party.	HD
Integrate seamlessly with Actsafe's existing web presence (i.e. the Actsafe website built in WordPress) to: <ul style="list-style-type: none"> 	M
Integrate seamlessly with productivity tools used by Actsafe (e.g. Office365 or Google Docs).	D
Integrate with Actsafe's payment processor of choice.	HD

Customization & Multi Tenancy

Provide support for Custom Learning Vocabularies,	HD
Provide support for Custom User Interface.	HD
Provide support for Customizable Branding.	HD
Provide support for Customizable Fields.	HD
Provide support for Customizable Workflows.	HD

Support

Implementation of the system must be supported by high quality, organization specific training including face-to-face training, access to written materials and online resources.	M
Product and technical support must be available to the organization before, during and after the initial implementation of the system.	M
Service Level Agreements must be established for the provision of support (including technical support, training support, software updates and maintenance) by the vendor.	M