
REQUEST FOR PROPOSAL

Database Design and Development for the Canadian Association for Co-operative Education

CLOSING DATE AND TIME:

May 15th, 2015

3:00:00 p.m. Eastern Standard Time

CLOSING LOCATION:

STREET ADDRESS:

720 Spadina Ave, Suite 202
Toronto, Ontario, M5S 2T9

MAILING ADDRESS:

720 Spadina Ave, Suite 202
Toronto, Ontario, M5S 2T9

Email: cafce@cafce.ca

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SECTION 1.0 INTRODUCTION AND PROJECT SCOPE OF WORK

1.1 Canadian Association for Co-operative Education (CAFCE)

CAFCE is a national not-for-profit organization created in 1973 as a volunteer forum for its members to exchange ideas, foster understanding and promote the benefits of post-secondary co-operative education in Canada. CAFCE currently has almost 500 members from over 65 colleges, institutions and universities across the country.

In 2013, this association celebrated 40 years of professional co-op practitioners partnering across Canada to develop resources that promoted the highest quality of post-secondary co-operative education programs. Volunteer members have achieved this through the establishment of national standards; promoting the value of post-secondary co-operative education and succeeding in the expansion of co-operative education programs across Canada through early seed-funding from the federal government in the seventies and eighties; and, by producing best practices resources. At the last formal count in 2007, there were approximately 80,000 enrolled in the member institutions' cooperative education programs.

CAFCE is the voice for post-secondary co-operative education in Canada with the following objectives to:

- Promote the value of accreditation as a means to enhance post-secondary co-operative education in Canada
- Develop and implement a plan to increase our capacity to achieve our goals and deliver value to our members
- Create a plan to make the best use of our finances and ensure the future stability of the organization
- Develop programs to increase volunteer participation and support by a broader group of members
- Invest in appropriate databases/information systems to support our goals
- Expand professional development opportunities and membership services
- Increase PD, sharing of best practices, networking
- Capitalize on international partnerships/alliances
- Address geographical barriers
- Explore possibility of professional designation and/or enhanced training
- Research
- Increase the value of membership
- Develop and implement a marketing and communications plan to enhance our position as the national voice for co-operative education
- National presence/Government Awareness
- Member communication; info updates; promoting benefits; engaging members to embrace CAFCE

1.2 Background and Nature of the Project

In October 2012 CAFCE issued an RFP to replace their website which was designed in Drupal 5.0 as many of the features of the website were no longer operational. The Association's website included features such as:

- A membership directory, with contact information
- A national institutional program directory, with detailed program information
- General information about the association (e.g., general info about co-operative education, awards, committees, upcoming events, news articles, other documents and resources)

Along with the website features, a statistic database was created behind the "Member Only" section of the website to collect national co-operative education statistical information. This version of the national database design was loosely modeled after the BC Co-op Education Provincial database (see http://bcprovd.db.coop.uvic.ca/coopdb_login.php). After the launch of the 2012 national database, which was also designed in Drupal 5.0, when members started entering their individual statistics for their co-op programs, the data in the reports were not providing accurate numbers. In combination with the necessary upgrade to Drupal 7 and required website upgrades (such as voting, automated emails to membership, membership management including membership sign up, renewal, etc.), the association decided to re-engineer the site to better reflect the needs that were not being met and to incorporate the latest web technology.

CAFCE launched a new website in 2014 that includes enhanced membership management functions. Ideally the new statistical database will be seamlessly presented through the website but will exist as a separate entity. The CAFCE website is hosted by Exware.

A national website and statistical database committee was convened in November of 2012 to manage and identify CAFCE needs for both the website and the statistical database. As a result, a number of resources such as report expectations, relevant spreadsheets and a list of needs are available as an appendix to this document. It is also important to note that this committee will be available throughout the design and implementation phase as a resource to the successful Proponent.

1.3 SCOPE OF WORK AND DELIVERABLES

The CAFCE Statistics Database will be an outward-facing application for members (end users) to input co-op program data and prepare that analyze such data. In addition to providing useful analytics for the actual members, the data will assist CAFCE with advocacy for Co-operative Education in Canada, as well as feed into provincial and federal government statistics. There will also be an inward-facing component for the CAFCE Administrator to manage the application.

The selected Proponent will plan, design, program and implement the creation of a new national statistical database that will include but not be limited to the following:

- ✓ Assessment of client needs and the design of visual mock-ups prior to development

- ✓ Database schema that fully outlines the relationship of the data prior to development (see appendices for suggested guidelines)
- ✓ Road map/time line for accomplishment of all responsibilities
- ✓ Development of all resources required to ensure the ease of user data submission/transfers, both one-of and in bulk, without requiring administrator access
- ✓ Seven (7) to nine (9) “standardized reports” where there are specific input fields and a standard output format, the ability to export data, and flexible design that will allow more reports to be built in the future
- ✓ A fully bilingual (French and English) end-product (input forms, confirmation screens, reports, help guides, etc.)
- ✓ Ability for administrative and end users to create “custom, on-demand” reports based on specific set of potential input criteria and standardized output format
- ✓ Data input process should ensure data integrity and consistency
- ✓ Comprehensive administrator function and easy-to-navigate end user functionality
- ✓ Communication strategies and methods
- ✓ Providing ‘report card’ review of project success at midpoint, completion and 6 months post-implementation
- ✓ Identification of gaps or issues and advising on processes to overcome them
- ✓ Advising on methods to best communicate and institutionalize this process
- ✓ Delivery of training to meet varied needs of members and the organization
- ✓ Consulting on the mechanics of the change management process including orchestration of the implementation plans

The Proponent will be required to work closely with the CAFCE Statistical Database Committee (Project Team) to ensure that all aspects of the RFP planning and facilitation process are provided as required.

The Proponent must have a proven track record in software and web-based application development with particular expertise in higher education organizations, especially Universities. Ideally, the successful Proponent will have extensive experience in database design and development:

- Intuitive, streamlined user interface design
- Working and communicating with a wide range of stakeholders, including but not limited to administration staff, business professionals, volunteers and student leaders
- Identifying, meeting and exceeding client expectations
- Providing superior client service in all respects

Through this Request for Proposal, CAFCE seeks to:

- Determine pricing and best-value
- Determine service options available
- Evaluate database software options
- Specify the terms and conditions that would govern any resulting contract
- Select the successful Proponent

This Request for Proposal provides the instructions for submitting proposals and the procedure by which service provider(s) will be selected.

In preparing your Proposal Response, please provide pricing information on all phases of the project, options and description of services available from your respective firm.

1.4 Project Design Considerations

Refer to Appendix A.

1.5 Sample Database Tables

Refer to Appendix B.

1.6 Sample Input/Output Forms and Standardized Reports

Refer to Appendix C.

1.7 Project Team

The project team will consist of members of CAFCE and will be convened once the successful vendor is chosen.

SECTION 2.0 INSTRUCTIONS TO CONSULTANT

This section defines the proposal preparation and submission procedures that are to be followed by all Consultants. Consultants are cautioned to carefully read and follow the procedures required by this Proposal as any deviation from these requirements may be cause for disqualification.

This is a Request for Proposal to be developed setting out the alternative means by which several technical, performance, time and other stated goals and objectives may be best met according to stated mandatory requirements.

2.1 Calendar of Events

<input type="checkbox"/> RFP Issued	April 1 st , 2015
<input type="checkbox"/> Cut-off Date for Submitting Questions	May 1 st , 2015
<input type="checkbox"/> Proposals Due	May 15 th , 2015
<input type="checkbox"/> Evaluation and Service Provider Selection	June 30 th , 2015
<input type="checkbox"/> Agreement/PO Issued	July 30 th , 2015
<input type="checkbox"/> Project Commencement	September 1 st , 2015
<input type="checkbox"/> Project Completion	August 31, 2016

2.2 Closing Date and Time

THE CLOSING DATE AND TIME FOR THIS RFP IS:

May 15th, 2015 at 3:00:00 P.M. EASTERN STANDARD TIME

Consultants have the sole responsibility to deliver and ensure proposals are time and date stamped at:

Canadian Association for Co-operative Education (CAFCE)

720 Spadina Ave, Suite 202

Toronto, Ontario, M5S 2T9

Email Proposals to be sent to cafce@cafce.ca

Fax Proposals will not be accepted.

2.3 Information and Inquiries

Any question related to the proposal must be directed in writing to the CAFCE Director of Operations whose name appears below. The Consultant shall not contact or ask questions of CAFCE for which the contract is being administered, unless so directed elsewhere in this document.

PROPOSAL INQUIRIES: Christina Campo, CAFCE Director of Operations
720 Spadina Avenue, Suite 202
Toronto, ON M5S 2T9
Telephone: 416-483-3311
Email: cafce@cafce.ca

The Consultant shall submit in writing by email (cafce@cafce.ca) any questions regarding the specifications, deliverables, scope of work, discrepancies, omissions or any apparent ambiguities to the attention of the **CAFCE Director of Operations** prior to May 1st, 2015.

The request for clarification will be reviewed, and where information sought is not already clearly indicated, the **CAFCE Director of Operations** may issue an Addendum to all Consultants that will become part of the RFP and Agreement document.

Addenda are the only means of verifying, clarifying, or changing any of the information contained in this Request for Proposal. Other than a member of the CAFCE Statistical Database Committee, no employee or agent of CAFCE is authorized to change the content of this Request for Proposal and/or any addenda. It is important that all questions be addressed prior to the cut-off date and time.

No response by CAFCE officially modifies the RFP in any way except by written addendum issued by CAFCE.

2.4 Communications Guidelines

From the release of the RFP until a Consultant or Service Provider is selected and an Agreement executed, the Consultant shall not communicate with any CAFCE staff or staff of CAFCE's agents (e.g., Consultants, etc.) concerning the RFP, except as set forth the methods described in sections 2.3. CAFCE reserves the right to contact the Consultant after receipt of proposals for clarification of any items within their proposal.

2.5 Changes and Extensions

CAFCE may amend specific sections of this RFP at any time during the proposal process. Should CAFCE issue an addendum to this RFP, the submission deadline may be extended for all prospective Consultants, if appropriate, to accommodate changes in proposal content.

2.6 Notification of Award

Consultants are invited to call CAFCE at 416-483-3311 to obtain the status of this Request for Proposal. CAFCE will notify the successful Consultant and issue a Purchase Order or formal Agreement.

2.7 Terms and Definitions

The following definitions apply:

- ❑ “Agreement” means the written agreement (contract) resulting from this Request for Proposal executed by CAFCE and the Proponent
- ❑ “Consultant” means an individual, firm or group that submits, or intends to submit, a proposal in response to this RFP
- ❑ “Contractor” means an independent firm, individual, or organization that is awarded a Contract and enters into an Agreement with CAFCE under this RFP and is not deemed to be an “employee” as defined by Canada Customs and Revenue Agency
- ❑ “Independent Consultant” means an independent firm, individual, or organization that is awarded a contract and enters into an Agreement with CAFCE under this RFP and is not deemed to be an “employee” as defined by Canada Customs and Revenue Agency
- ❑ “Must” or “mandatory” means a requirement that must be met in order for a proposal to receive consideration
- ❑ “Proponent” means an individual, Supplier, firm or group that submits, or intends to submit, a proposal in response to this RFP
- ❑ “RFP” means this “Request for Proposal”
- ❑ “Services” means labor, resources and materials provided by the Supplier or Service Provider as required to perform the Agreement as executed
- ❑ “Service Provider” means an individual, firm or group that is awarded an Agreement under this RFP
- ❑ “Should” or “desirable” means a requirement having a significant degree of importance to the objectives of the Request for Proposal
- ❑ “Supplier” means an individual, consultant, firm or group that is awarded an Agreement under this RFP
- ❑ “CAFCE” means the Canadian Association for Co-operative Education
- ❑ “Administrative User” or “Administrator” means CAFCE representative who is a super user and will manage the application as a whole
- ❑ “End User” means individual at member college/university/institution/employer who will input data and run reports

2.8 Proposal Presentations

Following the evaluations of the proposals, CAFCE may request up to two (2) top scoring Consultants to prepare an oral (or other) presentation. The presentation should focus on the scope of the project and deliverables as presented in this RFP. This will also give the evaluation team an opportunity to meet key personnel from the Consultant's organization that would be associated with this project. This will also allow the evaluation team to ask questions about the Consultant's proposal and presentation.

The selected top Consultant will be contacted as soon as possible to allow ample opportunity to prepare for the presentation. Criteria for scoring will be distributed to the appropriate Consultant prior to the oral presentations.

2.9 Withdrawal Conditions

The Consultant may withdraw their proposal at any time prior to the proposal closing date and time by submitting a written withdrawal letter. Submit the letter to the **CAFCE Director of Operations** and the proposal will be returned unopened where it can clearly be identified that it is a proposal submitted by the respective Consultant making the request.

2.10 Copies of Proposal Documents

Additional copies of the Proposal documents may be obtained by contacting CAFCE at: 416-483-3311.

2.11 Qualifications of Consultant

Prior to award of an Agreement, a Consultant may be required to satisfy CAFCE, in writing, that they have the necessary qualifications and resources available to carry out the work within the time limit specified in the Proposal documents. Consultants may be required to submit proof of any or all of the following information in a timely manner.

- ☐ Submit proof of financial capability by banker's reference and bonding adequacy by a surety company's consent
- ☐ Submit a list of equipment (hardware and software) that the Consultant is prepared to use for the work
- ☐ Submit proof that the personnel available to the Consultants have all trade qualifications and licenses necessary to perform the work

2.12 Examination of Documents

By submitting a proposal, the Consultant will be held to have personally examined the documents, carefully read the specifications, and to have satisfied themselves as to their ability to meet all the difficulties attending the execution of the proposed Agreement before the delivery of their proposal, and agree that the Consultant will make no claims against CAFCE based on errors, omissions, or misunderstanding of the provisions of the RFP or Agreement.

Consultants will not be given extra payments for conditions that should have been determined by/during the above inspection.

2.13 Opening of Proposals

Proposal opening shall be held after the date and time indicated in the proposal documents. All proposal openings are non-public unless specifically stated otherwise.

2.14 Consultant Checklist

This checklist has been provided solely for the convenience of the Consultant. Its use is not mandatory and it does not have to be returned with the proposal.

1. Everyone involved in putting together the proposal has read and understood the requirements.	<input type="checkbox"/>
2. The Receipt Confirmation form has been sent in.	<input type="checkbox"/>
3. The proposal meets all the mandatory requirements.	<input type="checkbox"/>
4. The proposal addresses everything asked for, particularly those things in the Project Requirements section.	<input type="checkbox"/>
5. The covering letter has been signed and attached.	<input type="checkbox"/>
6. The proposal clearly identifies the Consultant and the project.	<input type="checkbox"/>
7. The Consultant's name appears on the proposal envelope.	<input type="checkbox"/>
8. The appropriate # of copies of the proposal have been submitted.	<input type="checkbox"/>
9. The proposal is submitted at the closing location and before the closing time.	<input type="checkbox"/>
10. The proposal is being delivered by email, hand, courier or mail, but not by fax.	<input type="checkbox"/>
11. All required Appendices have been returned as stipulated in the RFP document.	<input type="checkbox"/>

SECTION 3.0 PROPOSAL RESPONSE FORMAT

In responding to this RFP, Consultants must address each of the format requirements detailed in this section in the order shown. Failure to follow this format may be sufficient cause for the rejection and disqualification of the Consultant's submission.

3.1 Cover Letter

The Cover Letter shall be no more than two (2) pages and in the form of a standard business letter and shall be signed by an individual authorized to legally bind the Consultant. The cover letter shall provide a summary of the services to be provided, and the name, telephone and fax number and email address of a contact person with authority to answer questions regarding the Proposal. The letter shall also include the name and phone number of a contact person to be notified regarding contractual issues.

3.2 Executive Summary

In one page or less summarize the key features of the Proposal.

3.3 Consultant Profile and Information

Consultant must provide information adequate to allow CAFCE to assess Consultant's background and relevant experiences in the implementation of similar projects. This information is required and should appear in this section of the Consultant's proposal.

All Proposals shall include a corporate profile that includes the following:

- ☐ Disclosure statement regarding the Consultant's organizational structure, including subsidiary and parent relationships, along with the Consultant's date of incorporation or formation of partnership or limited liability company
- ☐ Any other name(s) Consultant is, or has been, doing business under
- ☐ Number of years Consultant has operated in Canada
- ☐ Identification of the Consultant's principals and holders of debt or equity greater than 10% of the Consultant's assets
- ☐ Years of relevant experience
- ☐ Total number of employees
- ☐ Published Company Profile

3.4 Project Approach and Work Plan

Consultants shall provide a work plan describing the work flow necessary to complete all phases of this project and the Consultant's approach to satisfying the requirements of the RFP, including the extent of modifications, a Gantt Chart/timeline identifying phases, milestones (including dates), activities and tasks, related deliverables, estimated effort in hours by task and start and end dates for

phases. Consultant should provide sufficient detail regarding the estimated project hours so that CAFCE may evaluate the "reasonableness" of the workflow plan. All Application Descriptions as listed in Appendix A must be incorporated and concisely addressed in the Consultant Workplan.

The work plan shall identify where milestones are expected, with a clear definition of what shall be accomplished to meet the defined milestone, including CAFCE responsibility and Consultant responsibility.

During the various phases of this project, it is anticipated that CAFCE technical resources will be available only on a limited basis. Work plans should clearly identify any CAFCE resources required.

During the evaluation of submitted proposals, points will be awarded to those Consultants that CAFCE determines have clearly demonstrated the ability to provide an effective delivery of services and meet the required elements of this RFP in a timely manner.

3.5 Response Format Requirements

Consultant proposals must address all requirements. In instances where a Consultant solution does not directly meet the stated requirement, Consultant is encouraged to provide alternatives that are responsive to the desired outcomes of CAFCE.

CAFCE requires Consultants to respond to each of the requirements as detailed in Appendix A and the Project Scope identified in Section 1.3. Consultant's proposals shall include a restatement of the required deliverables, including reference number, listed under each individual requirement. Consultant shall describe in a narrative form how their proposal meets (or will meet) the stated requirement and what additional development or modifications will be necessary to meet the requirement including examples, workflow, screens and any other means necessary to support the Consultant's proposal.

Section 4.5.1 illustrates the Mandatory Criteria and Consultant Response Format of this Request for Proposal. Consultant **MUST** demonstrate compliance by indicating Yes or No in the column and initialing each item. Consultant must include the Section 4.5.1 checklist with their proposal responses.

Proposals that do not contain the completed Section 4.5.1 Schedule or do not clearly demonstrate by a yes or no that they meet each deliverable listed on the Schedule, will receive no further consideration during the evaluation process and their response will be deemed as non-compliant.

3.6 Proposal Costing and Price

Consultant must provide itemized detail relative to overall project costs, as well as identification of individual cost supports for individual, identifiable elements. The proposal cost detail supplied by the Consultant must sufficiently explain the components of cost to enhance CAFCE's capability of understanding and comparing proposal costs.

The Consultant is required to propose a payment schedule (firm fixed price) for the length of the project, describing the timing and amount of payments. The Consultant should also detail the methodology to be used for determining fees billed to CAFCE by the Consultant, including any possible cost reductions.

Prices shall be provided for the services identified in Appendix A. A complete list of items supplied by the Consultant and which do not appear on Appendix A are to be included with your Proposal response.

All prices shall be in Canadian funds.

3.7 Sub Contracting and Alliances

If the Consultant uses the services of a Sub-Consultant, the Consultant shall identify the Sub-Consultant; describe the skills and qualifications of the Sub-Consultant; describe what portions of the project will be assigned to the Sub-Consultant; identify the cost associated with the portions of the project assigned to the Sub-Consultant; and describe the inclusive periods and percentage of time the Sub-Consultant will devote to the project. The Consultant must describe the contractual arrangement contemplated with each Sub-Consultant and describe generally the control/delegation of responsibilities anticipated in that arrangement.

CAFCE reserves the right to review the credentials of the Sub-Consultant and to approve the selection of such Sub-Consultant.

The Consultant's decision to use a Sub-Consultant will not modify or abrogate the responsibility of the Consultant for the acts, omissions, nonfeasance, malfeasance or misfeasance of any and all Sub-Consultants.

The Consultant shall not subcontract any part of the Work or assign any part of the Contract without prior written consent of the CAFCE. Any consent to Subcontract shall not relieve the Consultant from its obligations and every Sub-Consultant shall incorporate all the terms of the contract that can be reasonably applied thereto.

The Consultant shall indicate in writing those Sub-Consultants or Service Providers whose proposals have been received by the Consultant that the Consultant would be prepared to accept for the performance of a portion of the work.

The Consultant shall preserve and protect the rights of the parties under the Agreement with respect to work to be performed under subcontract, and shall:

- ❑ Enter into Agreements with Sub-Consultants and Service Providers to require them to perform their work as provided in the Agreement
- ❑ Incorporate the terms and conditions of the Agreement into all Agreement documents
- ❑ Be responsible to CAFCE for acts and omissions of Sub-Consultants, Service Providers and individuals directly or indirectly employed by them as for acts and omissions of individuals directly employed by the Consultant

CAFCE may, at any time prior to execution of an Agreement, object to the use of a proposed Sub-Consultant or Service Provider who is not in good standing with the Worker's Compensation Board of the Province/State in which the contractor resides.

The Consultant shall employ only those Sub-Consultants or Service Providers that it proposed in writing and that are acceptable by CAFCE at the signing of the contract:

CAFCE may, for reasonable cause, object to the use of a proposed Sub-Consultant or Service Provider and require the Consultant to employ one of the other Sub-Consultants or Service Providers. CAFCE shall not be required to employ a Sub-Consultant or Service Provider to whom it may reasonably object.

In the event CAFCE requires a change from a proposed Sub-Consultant or Service Provider, the Contract Price shall be adjusted by the difference in cost and mark-up occasioned by such required change.

Nothing contained in the contract documents shall create a contractual relationship between a Sub-Consultant and/or Service Provider and CAFCE.

3.7.1 Schedule of Sub-Consultants

The Consultant must include a complete listing of all Sub-Consultants and/or Service Providers who will participate in the provision of services under an Agreement executed between the parties.

3.8 References (Refer to APPENDIX F)

- ☐ Provide three firms where service of similar scope and diversity has been provided within the past 12 months
- ☐ List references for the above firms including contact name, title and telephone number

3.9 Conflict of Interest

The Consultant shall present a statement at the time of the submission of a proposal that it presently has no interest and shall not acquire during the term of contract any interest, direct or indirect, which would conflict with the performance of services which are required to be performed under this RFP. The Consultant shall affirm that no person having such interest shall be employed in the performance of the RFP. The Consultant shall likewise advise CAFCE in the event it acquires such interest during the course of the contract.

The Consultant shall disclose any existing or prior relationships with CAFCE and the nature of that relationship. The Consultant must provide a disclosure statement concerning its organizational structure, including subsidiary or parent corporations and/or organization and ownership information.

3.10 Proposal Submission

The Consultant must carefully review all elements of their final proposals. Once received by CAFCE, a proposal cannot be altered. One complete, signed and bound paper copy of each proposal shall be submitted for evaluation along with one complete, signed copy in PDF format. Proposals shall be clearly marked RFP # CAFCE. All copies must be received by CAFCE by the submission date. Fax transmittals will not be accepted.

Proposals delivered after the deadline will neither be accepted nor evaluated, and shall be deemed non-responsive. Proposals will be opened immediately after the closing date and time.

Consultants should allow for normal mailing time to ensure timely receipt by CAFCE of the proposal.

Consultants shall complete and return the following by the proposal closing date and time:

- ☐ Signed CAFCE Proposal Submission Form (APPENDIX D)
- ☐ Other Appendices as specified
- ☐ Price Sheets (firm fixed price)

Consultants are not required to return sections containing the Terms and Conditions of the RFP document.

Proposals must be submitted in a clearly marked envelope identified with the name and address of the Consultant, addressed to CAFCE; and the proposal number and closing date and time clearly identified on the outside of the envelop or package.

3.11 Consultant Costs for RFP Response

CAFCE shall not be liable for any costs incurred in responding to this RFP, including the costs of proposal preparation and any travel relating to the proposal process, including attendance at any mandatory site visit and oral presentations.

3.12 Ineligibility of Proposals

It is essential that the Consultant thoroughly address and complete each requirement identified in this proposal in the order and format indicated.

Incomplete proposals will be declared as “non-responsive” and “non-compliant”.

Proposals that are improperly signed, conditional, illegible, obscure, or contain arithmetical errors, erasures, alterations, or irregularities of any kind will be deemed “non-compliant”.

Where there is a discrepancy, written amounts shall take precedence over figure amounts.

3.13 Proposal Signing

The Proposal Submission Form (APPENDIX D) **MUST** be completed and executed by a principal duly authorized to bind contracts on behalf of the Consultant.

The Consultant’s legal name and the capacity in which the signing officer acts shall be against the signature.

Proposal forms that do not contain an authorized signature will be deemed “non-compliant” and will not be accepted for evaluation.

An email submission will constitute an electronic signature. Where an email response is submitted, the original signed copy must be received by CAFCE within two working days of the stated closing date and time, otherwise the email response will be deemed non-responsive, non-compliant and rejected from further consideration.

3.14 Submission Conditions

It is the Consultants responsibility to ensure that they have received a complete set of documents as listed by the page numbers.

By submitting a proposal, the Consultant verifies that they have received a complete set of proposal documents including any and all addenda.

Except as provided in the “Withdrawal of Proposals” clause, proposals shall be irrevocable and shall remain open for acceptance by CAFCE for a period of thirty (30) calendar days after the proposal closing date.

3.15 Agreement Documents

The Consultant will be required to execute an Agreement which will constitute the complete and exclusive statement of the Agreement between the parties; which, shall supersede all proposals or prior Agreements, oral, written and all other communications between the parties relating to the subject matter of the Agreement.

The following list of documents, and any other documents with the agreement of the parties prior to issuance of the purchase order, shall comprise the Agreement documents:

- ☐ General Terms and Conditions
- ☐ Specific Terms and Conditions
- ☐ Specifications Scope of Work and Deliverables
- ☐ Proposal Forms and Related Documents
- ☐ CAFCE Purchase Order or Formal Agreement
- ☐ Addenda to RFP

Where the Terms and Conditions of the Purchase Order or Agreement conflict with those of any other Agreement document, the Terms and Conditions of the Agreement will prevail.

3.16 Proposal Form

The Consultant shall complete and execute CAFCE’s Proposal Submission Form (APPENDIX D) and include it in your response package. An incomplete or unsigned Proposal Submission Form shall result in your proposal being deemed “Non-Compliant” and rejected from consideration.

3.17 Completion of Work Statement

The Consultant shall state in their Proposal the time required to complete the work. The completion date in the contract shall be the completion time added to the commencement date. Time required for delivery is a significant consideration with respect to this award process. Consultants are asked to state a realistic completion time and to do everything possible within the realm of their ability to control the completion time.

SECTION 4.0 EVALUATION OF PROPOSALS AND AWARD

The award of an Agreement shall be based on CAFCE's evaluation criteria that include, but are not limited to:

- ❑ Best value to CAFCE based on a variety of factors including quality, service, references and price (Refer to APPENDIX E).

No award will be made to any Consultant who cannot give satisfactory assurance of their ability to carry out the Agreement.

CAFCE reserves the right to award an Agreement to the Consultant other than the one with the most points if, in its sole determination, another proposal is determined to be the most advantageous to CAFCE, taking into consideration the price and evaluation criteria of the RFP. Under no circumstances shall CAFCE be obligated to award an Agreement solely on the basis of proposed price.

CAFCE reserves its right to award an Agreement in full or part or to split an award with more than one firm on the basis of proposals received.

4.1 Privilege Clause

CAFCE will accept all properly submitted proposals as responsive and compliant. CAFCE may waive minor irregularities only if they are deemed to be non-mandatory and do not affect the “responsive” and “compliance” provisions of tendering.

CAFCE is not bound to accept the lowest priced or any Proposal of those submitted nor is it bound to award to any Proponent or the lowest qualified Proponent. Proposals will be evaluated against the criteria indicated within this RFP. CAFCE will be under no obligation to receive further information, whether written or oral, from any Proponent. ***If a Proponent fails to meet any one or more of the mandatory requirements specified in this RFP, CAFCE will reject that Proposal without further evaluation.***

CAFCE reserves the right to:

- ❑ Reject any and all Proposals, including without limitation the lowest priced Proposal, even if the lowest priced Proposal conforms in all aspects with the RFP; and to award the Agreement to whomever CAFCE, in its sole discretion deems appropriate, notwithstanding any custom of the trade to the contrary nor anything contained in the RFP herein
- ❑ Enter into negotiations with any one or more of the Proponent's on any or all aspects of their Proposal
- ❑ Award an Agreement in whole or in part as it deems appropriate and in its best interests
- ❑ In its sole and absolute discretion, to accept or reject any Proposal that, in the view of CAFCE, is incomplete or contains exceptions and variations to the terms and conditions of this solicitation

4.2 Evaluation Team

Evaluation of proposals shall be conducted by a team consisting of members of the CAFCE Statistical Database Committee, and by others who may be designated by the CAFCE Executive.

4.3 Evaluation Process and Methodology

CAFCE will use the following process to evaluate proposals:

The evaluation will entail a review of the formal requirements that are outlined in section 3.0. CAFCE will ensure that each section is included and clearly defined. Additionally, CAFCE will verify that certain administrative criteria are met.

4.4 Measurement Criteria and Ranking

CAFCE will evaluate all proposals on the basis of establishing best value to CAFCE. This may include any or all of the following criteria (the order of the list does not indicate order of importance):

4.4.1 Price

- ❑ Firm fixed price, including the lowest phase price
- ❑ Refer to APPENDIX G

4.4.2 Compliance to Specifications

- ❑ Consultant understanding of the Scope of Work, Requirements and Deliverables
- ❑ Ability to comply with Specifications and Scope of Work

4.4.3 Value Added Benefits

- ❑ Training and Educational Assistance
- ❑ Recycling and Environmental Programs

4.4.4 Quality

4.4.5 Service

4.4.6 Reliability

4.4.7 Technology Utilization

- ❑ Internet/EDI capability

4.4.8 Clarity and Completeness of proposal (format, content, detail)

- ❑ Proposed approach including, but not limited to planning, innovative supply management approaches, and partnership arrangements

4.4.9 Past Performance

- ❑ Consultant's experience and knowledge
- ❑ Consultant's reputation and qualifications

4.4.10 Financial Stability

4.4.11 Innovation and Creativity

- ☐ Ability and flexibility to add items to accommodate unforeseen needs or requirements
- ☐ Consultant's innovative ideas and recommendations for improvement

4.5 RFP Evaluation Factors and Criteria – Best Value Determination

Each section of the Consultant's proposal shall be evaluated for:

- ☐ The extent to which best practices are incorporated into the solution(s)
- ☐ Ability to meet CAFCE's expectations and deliverables
- ☐ Consultant's demonstrated capability to deliver the services and benefits stated

For a Consultant's proposal to be considered for evaluation, the Consultant must demonstrate compliance indicating a "Yes" or "No" in the column and initialing each item on all Schedules/Appendices where space is provided.

The following criteria and categories will be considered during evaluation of each Consultant's proposal. Only proposals that meet all mandatory requirements will be evaluated.

4.5.1 Mandatory Requirements:

Item #	Requirement Description	RFP Section Reference #	Compliance		Authorized Person's Initials	Comments
			Yes	No		
4.5.1.1	References					
4.5.1.2	No Health & Safety Infractions for the past one year					
4.5.1.3	Registered and Good Standing with WSIB/equivalent governing body.					
4.5.1.4	Two (2) Copies of Response – one bound hard copy, one soft copy in pdf format					
4.5.1.5	Receipt of RFP by closing date and time					

4.5.1.6	Licensed/Registered to do business in Canada					
4.5.1.7	Follow and Comply with Response Format explicitly					
4.5.1.8	All sections initialed/signed where required					

4.6 Short Listing Consultant

The evaluation process may include a short list of up to two Consultants based upon the stated criteria. The short listed Consultants may be asked to respond to questions; to provide additional information with respect to this proposal; and/or prepare an oral presentation in regards to its' proposal.

4.7 Negotiations

CAFCE reserves the right, at its discretion, to negotiate with the top ranked Consultant that in the opinion of CAFCE have submitted the most advantageous proposal. In no event will CAFCE be required to offer any modified terms to any other Consultant prior to entering into an agreement with a Consultant and CAFCE shall incur no liability to any other Consultant as a result of such negotiation or modifications.

It is the intent of CAFCE to ensure it has the flexibility it needs to arrive at a mutually acceptable Agreement. Negotiations may include, but will not be limited to, matters such as:

- ☐ Price adjustments
- ☐ Minor changes to scope of work
- ☐ Contract details
- ☐ Contract payment details
- ☐ Service requirements

It is not the intent of CAFCE to allow for new or significantly altered proposals in any negotiations with the top ranked compliant Consultant.

If an Agreement cannot be negotiated with the highest ranked Consultant, CAFCE may terminate negotiations with that Consultant and negotiate with the second highest ranked Consultant, or may choose to terminate the RFP process and not enter into an Agreement with any of the Consultant.

CAFCE shall not be obligated to any Consultant in any manner until an Agreement has been duly executed.

SECTION 5.0 TERMS AND CONDITIONS

5.1 General

By submitting a proposal, the Consultant acknowledges that it has read the RFP, understands it, and agrees to be bound by its requirements, terms and conditions. CAFCE reserves the right to disqualify any proposal that takes exception to or limits the rights of CAFCE under the RFP. CAFCE reserves the right to refuse any proposal not properly submitted in accordance with the requirements of this RFP. CAFCE reserves the right to reject the selected proposal or other proposals at any time prior to execution of an Agreement. CAFCE reserves the right to cancel this RFP at any time. CAFCE reserves the right to reduce the scope of services required herein and to negotiate the price to reflect such change after award of the Agreement.

Services to be provided under this Proposal are as listed and detailed in Appendix A.

Consultants are to provide their final and best offer.

Consultants shall carefully read the Proposal documentation and shall submit Proposals subject to all conditions contained in the Proposal document. Consultants shall make all investigations necessary for estimating as to the conditions under which the services must be supplied and its nature and location. The submission of a Proposal by a Consultant shall be construed by CAFCE to mean that the Consultant agrees to a proposal by and carry out all the conditions set forth in the Proposal Document.

Should the Consultant find any discrepancies, omissions, ambiguities, or conflicts on or between the Proposal documents, or be in doubt as to their meaning, the Consultant shall bring the question to the attention of CAFCE no less than five (5) working days before the proposal closing time. The question will be reviewed and where the information sought is not clearly indicated CAFCE will issue Addenda that will become part of the Proposal Document **and forwarded to all Consultants.** Should a Consultant fail to bring the discrepancy, omission, ambiguity or conflict to the attention of CAFCE in writing before the aforesaid time, the Consultant shall accept the decision of CAFCE as to the resolution of such discrepancy, omission, ambiguity or conflict and it will be deemed that the Consultant has included the more costly alternative in its Proposal.

CAFCE reserves the right to amend or revise the Proposal document by Addenda up to the Proposal closing time. Verbal instructions given in person or over the telephone are null and void and shall not be accepted by the Consultant. It is the Consultants responsibility to ascertain and verify prior to the Proposal closing time that it has received any and all Addenda issued in relation to a Proposal Package.

All hard copy proposals must be delivered to CAFCE by hand, courier, mail or taxi at the address specified within this document and in a sealed envelope. Materials supplemental to your proposal that may be too bulky for a proposal envelope, can be submitted under separate cover with clear reference to the proposal number. PDF version of proposal should be submitted to cafce@cafce.ca.

5.2 Transition Plan

During contract negotiations with the selected Consultant, CAFCE and the Consultant may negotiate concerning a transitional plan if CAFCE deems it necessary.

5.3 Changes and Substitutions

CAFCE reserves the right to change service requirements during the term of an Agreement resulting from this RFP.

CAFCE may at any time, by written order, make changes to the selected Consultant's obligations or method of performance within the general scope of an Agreement. If any change causes an increase or decrease in any part of the work under the Agreement, CAFCE shall make an equitable adjustment in the "fixed price amount", the fee rate structure, the performance schedule, or other affected terms, as appropriate, and shall modify the Agreement accordingly.

The selected Consultant must assert its right to an adjustment under this clause within thirty (30) days from the date of receipt of the written order. However, if CAFCE decides that the facts justify it, CAFCE may receive and act upon a request for equitable adjustment before any final payment under the Agreement.

If the change relates only to the amount of effort (i.e., number of hours) to be incurred by the selected Consultant under the Agreement, the equitable adjustment shall be calculated by:

- ❑ Considering the increase in the number of hours reasonably required to perform the change;
- ❑ Applying those increased hours to the selected Consultant's fee rate structure; and
- ❑ Increasing the "not to exceed amount" by the resulting amount.

The only person with the authority to act on behalf of CAFCE in ordering or approving a change in performance that causes a change to the selected Consultant's costs is:

President, CAFCE
720 Spadina Avenue, Suite 202
Toronto, ON, M5S 2T9
Telephone: 416-483-3311
Email: cafce@cafce.ca

Any change ordered or approval by another person, whether or not employed by CAFCE, shall not be binding on CAFCE.

Failure to agree to any adjustment shall be a dispute that, if not settled, can be pursued through normal channels of dispute resolution. A failure to agree on an adjustment shall not excuse the selected Consultant from proceeding with the contract as changed.

5.4 Travel and Other Related Expenses

Any travel or per diem required by the selected Consultant to carry out its obligations under the contract shall be at the selected Consultant's expense. Any travel requested by CAFCE after the award of the contract may be considered for payment by CAFCE.

All travel expenses where allowed are to be charged at the same rates as provided by the current CAFCE travel policy guidelines.

Reimbursable expenses such as photocopier, fax, long distance calls, courier, etc. where allowed, are to be billed to CAFCE at cost. Other types of expenses are to be pre-approved by CAFCE's designated representative as identified in Sections 2.3.1 and 2.3.2. Consultants are to provide copies of disbursements with their invoices.

5.5 Award of Agreement and Agreement Requirements

The Consultant receiving the most points in the evaluation and oral presentation will be the proposed winner of the contract award. Notwithstanding the foregoing, CAFCE reserves the right to award the Agreement to the Consultant other than the one with the most points if, in its sole determination, another proposal is determined to be the most advantageous to CAFCE, taking into consideration the price and evaluation criteria of the RFP. However, under no circumstances shall the evaluation team (committee) be obligated to award the Agreement solely on the basis of proposed price.

If two or more Consultants were to receive the same amount of points, the evaluation team may request that Consultants provide further information by a presentation.

CAFCE will notify the successful Consultant and issue a Formal Agreement. All respondents are invited to request the **name** of the successful Consultant. No further information regarding this proposal will be released in order to maintain confidentiality of commercial proposals.

Any Agreement for the performance of services resulting from this RFP shall incorporate this RFP, any written addenda issued by CAFCE, and the selected Consultant's proposal into the executed Agreement. To the extent that the terms and conditions of this RFP and a proposal may be inconsistent, the terms and provisions of the RFP prevail. To the extent that the RFP and proposal are inconsistent with the resulting Agreement, the terms and provisions of the resulting Agreement shall prevail.

Consultants may submit a copy of their standard or prototype agreement with their proposal for reference purposes.

5.6 Year and Date Authentication

The Consultant must adhere to CAFCE standardization of a numeric date format-century/year/month/day for electronic storage purposes and alphanumeric-month/day/century/year for written correspondence.

CAFCE, at its sole option may require the Consultant, at any time, at no cost, to demonstrate compliance and the procedures it intends to follow in order to comply with all the obligations contained herein.

5.7 WSIB Coverage – Assessments

As a condition of the Agreement, all Consultants must be registered and in good standing with the Workers Compensation Board of the Province in which they reside. The Consultant is required to maintain this good standing for the duration of the Agreement. Failure to do so will be grounds for termination of the Agreement and such termination shall not result in any penalty to CAFCE.

The selected Consultant shall submit a copy of the certificate (clearance letter) showing that the Consultant and Agents are in good standing and are covered by workers' compensation, employees' liability and/or Consultant's insurance in amounts sufficient to satisfy all claims that might arise from

its acts or those of the employees and agents. The selected Consultant is responsible for ensuring contractually that any Sub-Consultants maintain workers' compensation insurance at all times during the term of the resulting Agreement. Failure to maintain coverage at any time during the term of any Agreement shall be deemed a material breach of the Agreement. Upon any such failure, the Agreement shall be deemed void in its entirety, and the selected Consultant shall not be entitled to any payment pursuant to the Agreement or otherwise.

5.8 Occupational Safety and Health - Infractions and Compliance

The Consultant and their "Designated Employee(s) shall comply with all applicable Industrial Health and Safety Regulations, First Aid Regulations, Occupational Environment Regulations, Controlled Products Legislation, and the Federal and Provincial Workplace Hazardous Materials Information Systems (WHMIS) Regulations while on CAFCE premises.

5.9 Agreement Compliance

During the term of this contract, CAFCE 's designated representatives shall be responsible for monitoring the selected Consultant's performance and compliance with the terms and conditions of the Agreement. It is specifically understood that the nature of the services to be rendered pursuant to any Agreement resulting from this RFP are of such a nature that CAFCE is the sole judge of the adequacy of such services.

5.10 Agreement Termination

If for any reason the selected Consultant should fail to fulfill its obligations under the Agreement in a timely and professional manner, or if the selected Consultant should violate any of the covenants, agreements, or stipulations of the Agreement or applicable legal statutes, CAFCE shall have the right to terminate the Agreement by giving five (5) days written notice to the selected Consultant of such termination by Certified Mail or by hand; except that failure to maintain professional liability coverage, comprehensive general liability coverage, or Workers' Compensation coverage will immediately terminate any Agreement made pursuant to this RFP.

If CAFCE 's representative observes any infraction(s), such shall be documented and conveyed to the selected Consultant for immediate correction. If the selected Consultant fails to rectify the problem(s), CAFCE's designated representative shall notify CAFCE to help resolve the issues. Continued failure on the selected Consultant's part to comply with the terms and conditions of the ensuing Agreement may result in the immediate removal of the selected Consultant from the Agreement by CAFCE, or result in the accrual of liquidated damages.

In the event that CAFCE executes its right to terminate the Agreement, the selected Consultant shall not be relieved of any liability for damages sustained by CAFCE by virtue of any breach by the selected Consultant, and CAFCE may withhold any payment due to the selected Consultant, whether the payment is due to the selected Consultant under the Agreement or otherwise, for the purpose of set off until such time as damages to CAFCE are determined.

5.11 Default by Consultant

CAFCE declares and the selected Consultant acknowledges that CAFCE may suffer damages due to the failure of the selected Consultant to act in accordance with the requirements, terms and conditions of the Agreement. CAFCE declares and the selected Consultant agrees that such failure shall constitute an event of default on the part of the Consultant. The selected Consultant agrees that if CAFCE does not give prompt notice of such a failure, that CAFCE has not waived any of its rights or remedies concerning the failure by the Consultant.

5.12 Liquidated Damages

In the event that the selected Consultant fails to remedy a default or breaches any non-voidable term or condition of the Agreement, the selected Consultant agrees to Reimburse CAFCE for any actual and direct losses incurred by CAFCE. In addition, the selected Consultant agrees that CAFCE shall have the right to terminate the Agreement either in whole or in part, without liability to CAFCE whatsoever. The selected Consultant agrees that the liquidated damages are not a penalty.

5.13 Termination For Convenience

Notwithstanding section 5.10, CAFCE, in its sole determination, may terminate the Agreement with the selected Consultant for convenience by giving not less than five (5) days notice in writing to the selected Consultant of its intent to so terminate for convenience and the effective date of such termination. In the event that termination under this provision is elected, the selected Consultant shall receive payment for work satisfactorily performed as determined by CAFCE to the date of termination.

CAFCE reserves the right to cancel all or any part of the contract if services, or deliveries are not in accordance with the deliverables and specifications identified herein. Such cancellation shall not result in any penalty or other charges to the CAFCE.

5.14 Ownership and Intellectual Property

The copyright of the material developed by the Consultant under an Agreement under this RFP is the exclusive ownership of CAFCE and the Consultant may not use, market, distribute, publish or refer to any portion without the prior written consent of the CAFCE.

All programs, documents, data, information and material, in whatever form, produced or prepared for CAFCE pursuant to an Agreement under this RFP shall be owned by CAFCE and the exclusive property of CAFCE.

Upon the expiration of any Agreement under this RFP or upon an earlier written request from CAFCE to the Consultant, the Consultant shall deliver to CAFCE within five (5) working days all programs, documents, data, information and material that is the property of CAFCE and in the possession of the Consultant. Copies or duplication of any such programs, documents, data, information or material shall be retained by the Consultant without the express written consent of CAFCE.

This section shall survive the expiration or termination of any Agreement executed under this RFP.

5.15 Evaluation Disclosure

CAFCE, its staff, and/or representatives are under no obligation to discuss or disclose to the public the evaluation of any proposal during the evaluation process.

5.16 Governing Law and Compliance

Any Agreement resulting from this Request for Proposal will be governed by and will be construed and interpreted in accordance with the laws of the Province of Ontario. All disputes arising out of or in connection with the Agreement must, unless the parties otherwise agree, be referred to and finally resolved by arbitration pursuant to the Commercial Arbitration Act.

The selected Consultant shall be a legally constituted partnership, limited liability company or corporation in compliance with all laws and regulations governing such corporations, partnerships or limited liability companies including the Workers' Compensation laws of Canada and the respective registered province of the Consultant. The selected Consultant shall remain in compliance with the applicable workers' compensation laws of, and all other Canadian corporate, partnership or limited liability company laws for the duration of any agreement awarded pursuant to this RFP. Failure to maintain workers' compensation coverage shall immediately terminate any Agreement resulting from this RFP.

The Consultant agrees to comply with all laws and regulations affecting this Request for Proposal document in any manner and agree to take further steps as may be necessary to effect such compliance. All laws and regulations required to be incorporated in an Agreement of this character are hereby incorporated by inference.

5.17 Publicity and Advertising Limitation

An Agreement between a Consultant and CAFCE does not permit Consultant to advertise its relationship with CAFCE without CAFCE's prior written authorization.

Any use or reference to this RFP by the selected Consultant to promote, solicit, or disseminate information regarding the scope of the contract is prohibited, unless otherwise agreed to in writing by CAFCE.

5.18 Indemnity, Liability and Insurance

5.18.1 Indemnity

Any Contract resulting from this Request for Proposal will require that the Contractor indemnify and save harmless CAFCE and its members, officers, employees, students, agents, volunteers and independent contractors (all of whom are hereinafter collectively referred to as "CAFCE") from and against all claims, demands, losses, damages, costs and expenses made against or incurred, suffered or sustained by CAFCE at any time or times (either before or after the expiration or sooner termination of this Contract) where the same or any of them are based upon or arise out of or from

anything done or omitted to be done by the Contractor or by any servant, employee, officer, director or sub-Contractor of the Contractor pursuant to the Contract excepting always liability arising out of the independent acts of CAFCE.

5.18.2 Insurance

The Consultant shall, without limiting its obligations or liabilities herein and at its own expense, provide and maintain the following insurance with insurers licensed in their Canadian province and in forms and amounts acceptable to CAFCE. The Consultant shall provide CAFCE with evidence of all required insurance prior to the commencement of work or services. Such evidence shall be in the form of a completed Provincial Certificate of Insurance. When requested by CAFCE, the Consultant shall provide certified copies of required policies.

The Consultant will have in effect at all times during the continuation of this Agreement and during any stipulated warranty periods, an occurrence based contract of Comprehensive or Commercial General Liability (including products and completed operations, blanket or broad form contractual, personal bodily injury and broad form property damage) covering the Consultant, its servants, employee, officer, director, agents, sub-contractor or Affiliates with minimum limits of \$2,000,000 per occurrence.

The Consultant shall execute free of charge or expense to CAFCE any warranty claim resulting from errors or omissions by the Consultant, its servants, employee, officer, director, agents, sub-contractors or Affiliates where permitted, without prejudice to any claim that CAFCE may have against the Consultant.

The Consultant will have in effect at all times during the continuation of this Agreement and during any stipulated warranty periods after completion of this Agreement, Professional Liability Insurance in the form of Errors and Omissions Insurance covering the Consultant, its servants, employee, officer, director, agents, sub-contractor or Affiliates up to the value of this Agreement.

All required insurance shall be endorsed to provide CAFCE with 30 days advance written notice of cancellation or material change.

The Consultant hereby waives all rights of recourse against CAFCE with regard to damage to the Consultant's property.

5.19 Conditions Precedent - Funding

It is expressly understood by the parties that the Agreement, or any amendments, as a result of adjustments, is not binding on CAFCE until such time as all necessary funds are made available and such expenditure of funds is approved. No Agreement shall be binding upon either party until receipt by the selected Consultant of a copy of a fully executed Agreement, and compliance with any and all conditions precedent.

5.20 Invoicing and Payment

Consultants are required to take into account “Prompt Payment” when establishing your “final and best offer” pricing.

All invoicing must be consistent with CAFCE’s requirements and instructions.

Invoices shall be submitted on a monthly basis unless otherwise specified in the RFP document.

CAFCE payment terms are Net 30 days of the invoice date unless agreed to otherwise between the parties.

All charges and credits are to be shown on invoices and statements.

A proper invoice is defined as being free from defects, discrepancies, errors, or other improprieties and shall include, but may not be limited to:

- ☐ Consultant's name and address as designated in the RFP
- ☐ Consultant's federal employer identification number
- ☐ The Agreement authorizing the purchase of services
- ☐ Description, including time period (date received and date reported), of services delivered or rendered as specified in the Purchase Order

Defective invoices shall be returned to the Consultant noting areas for correction. When such notification of defect is sent, the required payment date shall be thirty (30) days after receipt of the corrected invoice.

In the event that CAFCE does fail to make prompt payment, the selected Consultant is entitled to the interest allowed by law. In no event shall failure to make prompt payment be deemed a default or breach of Agreement on the part of CAFCE.

Any changes regarding payment after Agreement award will not be permitted. The selected Consultant's payment shall not be initiated before a proper invoice is received by CAFCE.

5.21 Audits and Inspections of Financial Reports

All records and documents associated with an Agreement, payments and reporting resulting from this RFP shall be subject to audit by CAFCE’s designated auditors for compliance with all appropriate accounting standards and practices.

CAFCE reserves the right to inspect the records and work papers of the selected Consultant's organization to determine the validity of billings for work performed. Adequate records to support these charges must be maintained. Documentation must be retained for review for at least three (3) years subsequent to final payment.

CAFCE, or its agent, may review or audit any and all of the services performed by the Consultant under this Agreement.

CAFCE, or its duly authorized representatives, will have access at all reasonable times and upon reasonable notice to the Consultant, during this Agreement, to the Consultant's personnel, books, records and other documents pertaining to materials and/or services provided under this agreement for the purpose of auditing and verifying any accounts invoiced under this Agreement. The Consultant shall preserve all the aforesaid documents for a period of three (3) years after delivery of the materials and/or services.

5.22 Taxes

Prices proposed shall be firm Canadian dollars and shall include all costs of supplying the services specified, including all taxes and duties required.

5.22.1 USA Withholding Tax

Non-resident of Canada are subject to a "Withholding Tax" of 15% as per paragraph 153(1)(g) of the Canadian Income Tax Act and Subsection 105(1) of the Income Tax Regulations. The tax is considered a payment on account of the non-residents overall tax liability to Canada. CAFCE is required to withhold the USA Withholding Tax from all payments where US citizens provide services in Canada in accordance with the Canadian Income Tax Act and Regulations.

It is the responsibility of the Consultant to apply to Canada Customs and Revenue Agency, Taxation for a "Non-Resident Tax Waiver Certificate" and provide this to Purchasing Services Department prior to commencement of work under an Agreement awarded under this RFP.

5.23 Personal Harassment

All Consultants who provide services to CAFCE are subject to *CAFCE Fair Treatment Policy*. CAFCE will not tolerate behavior that is likely to undermine the dignity, self-esteem, or productivity of any CAFCE employee or member.

Violation of the Fair Treatment Policy is a fundamental breach of this Agreement. If CAFCE is satisfied after investigation that the Consultant has interacted with a CAFCE employee or member in this manner, the Agreement may be canceled without notice. CAFCE is entitled to receive as damages from the Consultant a sum equal to any costs incurred by CAFCE in completing the contract service over and above the original contract price. Details of the *Fair Treatment Policy* are available on CAFCE's website at <http://www.cafce.ca/fairtreatment-policy.html>

5.24 Warranties And Guarantees

If within a period of one (1) year from the date of acceptance of the services by CAFCE, such services or any portion thereof are found by the CAFCE to be defective or faulty due to imperfect or bad design, the Consultant agrees to replace such defective services forthwith without expense to the CAFCE.

Consultants are to specify written warranty periods, from the date of acceptance of any item under this Proposal and contract awarded.

5.25 Errors and Omissions

The Consultant shall execute free of charge or expense to CAFCE any work required resulting from errors or omissions by the Consultant and their Sub-Consultants where permitted, without prejudice to any claim CAFCE may have against the Consultant.

While CAFCE has made considerable efforts to ensure an accurate representation of information in this Request for Proposal, the information contained in this RFP is supplied solely as a guideline for Consultant and is not necessarily comprehensive or exhaustive. Nothing in this proposal is intended to relieve Consultant from forming their own opinions and conclusions in respect of the matters addressed in the proposal.

5.26 Assignments

An Agreement resulting from this Request for Proposal shall not be assigned by the Consultant without the prior consent of CAFCE.

5.27 Infringement

All Consultants warrant that the services, software or technology described herein, and the provision or use of them, will not infringe on any patent, copyright, trademark or intellectual property rights.

All Consultants warrant that the items described herein and the sale or use of them, will not infringe on any patent, copyright, trademark or intellectual property rights.

The Consultant covenants that it will defend at its own cost and expense, every action which may be brought against CAFCE or those selling or using purchased services for any alleged infringement of any patent by reason of the provision or use of such articles, and Consultants agree to pay all costs, damages, fines and profits recoverable in any such action or to indemnify CAFCE for such costs damages, fine, and profits claimed from CAFCE in any such action.

5.28 Acceptance

Should all proposals exceed the CAFCE's set budget or not receive approval, CAFCE reserves the right not to accept any proposals.

5.29 Rejections of Proposal/Proposal Responses

CAFCE reserves the right to reject without limitation any or all proposals, including the lowest price proposal even if the lowest price proposal conforms in all respects with the RFP.

5.30 Amendments and Withdrawals

The Consultant may withdraw their proposal at any time prior to the proposal closing time by submitting a written withdrawal letter. Submit the letter to the **CAFCE Board Representative** and the proposal will be returned unopened.

5.31 Error in Proposal

No proposal shall be altered, amended, or withdrawn after the opening of proposals. Negligence on the part of the Consultant in preparing the proposal documents confers no right for withdrawal of the proposal after it has been opened.

While CAFCE has made considerable efforts to ensure an accurate representation of information in this RFP, the information contained in this RFP is supplied solely as a guideline for the Consultant and is not necessarily comprehensive or exhaustive. Nothing in this RFP is intended to relieve the Consultant from forming their own opinions and conclusions in respect of the matters addressed in the RFP.

5.32 Error in Pricing

In case of conflict between the unit prices and totals, the unit price will govern.

5.33 Alternatives and Equivalents

Whenever possible, the Consultant should submit a basic proposal which conforms strictly to the requirements specified herein, but may, as an option, submit an alternative which is superior to, or equal to and less costly, than the requirement specified herein. Where alternates or equivalents are offered in lieu of the item specified, detailed specifications and illustrative literature must be provided with proposals.

5.34 Confidentiality and Protection of Privacy

The Consultant will treat as confidential and will not, without the prior written consent of CAFCE, publish, release or disclose or permit to be published, released or disclosed, the Material or any information supplied to, obtained by, or which comes to the knowledge of the Consultant as a result of this Agreement, except insofar as such publication, release or disclosure is necessary to enable Consultant to fulfill its' obligations under this Agreement. The Consultant recognizes that all material and other information referred to above is protected by the provisions of the *Freedom of Information and Protection of Privacy Act* ("FIPPA") and agrees not to use or disclose any such Material or information except as permitted by the FIPPA.

The Consultant will allow CAFCE to publish any Material in accordance with the FIPPA. If disclosure of any portion of the Material may cause harm to the Consultant, the Consultant must provide details of the harm in accordance with section 21 of the FIPPA.

The obligation to keep confidential shall however not apply to information which:

- (a) is already known to the party to which it is disclosed;
- (b) becomes part of the public domain without breach of this Agreement; and,
- (c) is obtained from third parties which have no obligations to keep confidential to the contracting parties.

Each party acknowledges that Information provided by either party in connection with this

Agreement, may contain confidential and proprietary data, and disclosure of such Information may be damaging to the disclosing party. The term Information denotes any and all technical and business Information disclosed in any manner or form including, but not limited to financial plans and records, marketing plans, business strategies, trade secrets, present and proposed products, computer software programs, source code, relationships with third parties, customer lists, Information regarding customers and suppliers, founders, employees and affiliates. Both parties agree to hold Information in confidence, not to make use of it other than as required for the performance of this Agreement, to release it only to employees requiring same, and not to release or disclose it to any other third party. The duties and obligations to protect Information shall survive termination of this Agreement for a period of three (3) years; provided, however, that to the extent any Information constitutes a trade secret, such duties and obligations shall remain in effect with respect to such Information for so long beyond such three (3) year period as such Information remains a trade secret as so defined.

5.35 Legal Requirements

The successful Consultant(s) will enter into negotiations with CAFCE to establish a formal Agreement.

5.36 Dispute Resolution

All disputes arising out of or in connection with the Agreement must, unless the parties otherwise agree, be referred to in accordance with the laws of the Province of Ontario where the CAFCE office is located. Disputes shall be filed in writing and must be filed with CAFCE. All disputes must be filed within ten (10) days of the protester knowing or should have known the basis of the dispute or protest.

Disputes Notice must include:

- ☐ The name, address and telephone number of the protester
- ☐ The signature of the protester or his or her representative
- ☐ A detailed statement of the legal and factual grounds of the dispute/protest including copies of relevant documents
- ☐ The form of the relief requested

5.37 Disqualification

Failure to complete and sign all pages of your Proposal may disqualify your proposal offer.

It is essential that your proposal address each requirement identified in the proposal:

- ☐ Incomplete proposals may be declared "non-responsive"
- ☐ Proposals that are improperly signed, conditional, illegible, obscure, or contain arithmetical errors, erasures, alterations, or irregularities of any kind may be considered invalid
- ☐ Where there is a discrepancy, written amounts shall take precedence over figure amounts

5.38 Agreement Term

The term of an Agreement shall commence on the date of award and continue to completion unless terminated, cancelled or extended by CAFCE; and shall be subject to any conditions precedent

5.39 Reports and Records

User management reports will be expected from the Consultant on a scheduled basis. Reports will include service provided, progress against stated deliverables and milestones, costs, etc. A format will be developed in concert with the Consultant.

The report shall be submitted electronically and in hard copy on a regular basis as required by CAFCE.

5.39.1 Records

The Consultant shall keep records of all time for which the Consultant invoices the CAFCE, and CAFCE shall have free access at all reasonable time to such records for the purposes of reviewing or copying the same.

CAFCE shall have access at all reasonable times and upon reasonable notice to the Consultant to the Consultant's personnel, books, records and other documents pertaining to the services provided under this Agreement for the purpose of auditing any accounts under this Agreement.

5.40 Proposal Certification

Consultants must only submit Proposals on those documents provided and must date and sign each page in the section provided. Submissions in any other form may not be accepted.

5.41 Submission Conditions

All materials submitted to and accepted by CAFCE in response to this RFP shall become the property of CAFCE and will be retained by CAFCE in accordance with CAFCE Records Retention Policy. The contents of the proposal are subject to the Freedom of Information and Privacy Protection Act (FIPPA). The Consultant should note within its proposal whether it considers any part of the proposal as proprietary or trade secret. CAFCE will attempt to keep, to the best of its ability, proprietary or trade secret material confidential, only to the extent permitted by law. Notwithstanding the foregoing, CAFCE shall have sole discretion in determining whether any part(s) of Consultant' proposals contain information that is exempt from FIPPA legislation.

It is the Consultant's responsibility to ensure that they have received a complete set of documents as listed by the page numbers. By submitting a proposal, the Consultant verifies that they have received a complete set of proposal documents including any and all addenda.

5.42 Ineligibility of Proposal

Proposals will not be evaluated if the Consultant's current or past corporate or other interests may, in the CAFCE's opinion, give rise to a conflict of interest in connection with this project.

5.43 Financial Conditions

CAFCE reserves the right to investigate a Consultant's financial position if it deems it necessary in determining the successful Consultant.

Consultants are further cautioned that the acceptance of their proposal will preclude them from participating as a Consultant in possible subsequent phases where a conflict of interest may arise. This includes, but is not limited to, current or future corporate or other interests in connection with this project.

Before submitting a proposal, the Consultant should consider the extent, complexity, and difficulties involved in provisioning the requirements of this RFP. The Consultant is expected to include in the proposal all costs that are necessary to transition to and provide the services described within the RFP.

5.44 Termination for Convenience

CAFCE reserves the right to terminate an Agreement made under this RFP by providing five (5) days written notice, or without notice for cause.

5.45 Performance and Default

If the Consultant defaults or fails to perform in accordance with the Terms and Conditions of this offering or otherwise does not comply with the Agreement as it affects the supply obligations, CAFCE may, at its sole discretion terminate any remaining portion of this Agreement with the Consultant upon five (5) days written notice delivered to the Consultant free of any claim of the Consultant of every nature and kind.

CAFCE reserves the right to cancel all or any part of the Agreement if services, or deliverables are not in accordance with the specifications identified herein. Such cancellation shall not result in any penalty or other charges to CAFCE.

In the event of default on the part of the Supplier, or delivery of deficient/defective services, CAFCE shall hold the Consultant responsible for excess costs incurred in purchasing an equal service from another source of supply.

5.46 Consultant's Obligation

When work is found incomplete or unsatisfactory, the Consultant shall rectify the condition immediately at its own expense. Periods of unsatisfactory performance shall not be paid for and where this occurs, monthly progress payments shall be pro-rated. Repeated unsatisfactory performance will constitute a breach of the Agreement.

5.47 Defective Work

The Consultant shall promptly remove from the work site and replace or re-execute defective work that has been rejected by CAFCE as failing to conform to the Agreement documents whether or not the defective work has been incorporated in the work and whether or not the defect is the result of poor workmanship, use of defective products, or damage through carelessness or act of omission of the Consultant.

5.48 Inspection, Testing and Acceptance

CAFCE reserves the right to reject claims for payment for unsatisfactory service.

Final inspection for services shall not impose liability on CAFCE for such services that are not in accordance with the specifications.

Should the Consultant not carry out its obligations within the agreed upon time set for remedial action, CAFCE may remove, replace and modify the unsatisfactory work at the Consultant's expense.

Should any dispute arise as to quality or compliance to services required, the decision as to quality rests strictly with the CAFCE.

5.49 Delivery and Installation

Consultants must indicate response time from the date and time of services being requested.

Should the Consultant contemplate any delay in delivery or installation, CAFCE's representative shall be notified in order that other remedial action may be taken to prevent delay in performance.

5.50 Agreement Extensions and Renewal Options

At the sole discretion of the CAFCE, the Agreement resulting from this Request for Proposal may be renewed, on the same terms as the initial Agreement, for a further term, the length of which will be determined by the CAFCE.

5.51 Commencement of Work

No work of any kind shall commence prior to the issuance of a Purchase Order or Agreement by the CAFCE.

5.52 Delay of Work

A Consultant anticipating any delay in the performance of the work shall notify CAFCE as soon as possible providing full details of the delay and expected time of completion. If the work to be completed is delayed as a result of an event or circumstance and is no fault of the Consultant, could not have been anticipated nor avoided, the Consultant may request an adjustment of time for completion. Otherwise, if the work is not completed on time, the Consultant is in breach of the Agreement.

5.53 Hours of Work

Services are to be performed during regular working hours unless arranged otherwise by CAFCE's designated representative. Monday to Friday: 9:00 a.m.-5:00 p.m. EST/EDT; or at times as may be arranged between the parties.

5.54 Security Clearance

When using CAFCE premises, the Consultant will comply with, and will take all reasonable steps to ensure that they and their "Designated Employee(s) comply with all security requirements in effect for the respective premises.

5.55 After Hours Access

Should work be required on CAFCE premises after regular business hours, the Consultant is responsible for notifying CAFCE's designated representative to obtain security clearance.

5.56 Permits and Licenses

5.56.1 Temporary Employment Authorization

The Consultant shall be responsible, legally and financially, to obtain Temporary Employment Authorization(s) from Canada Citizenship and Immigration for any individual contracted to the CAFCE who is not a permanent resident of Canada any may be ineligible to work in Canada.

5.57 Material Compliance

If the Consultant does not carry out its obligations within a reasonable time, CAFCE may remove and replace or modify the unsatisfactory work at the Consultant's cost. Should any dispute arise as to the quality or fitness of products, the decision as to the quality and fitness rests strictly with the CAFCE.

If delays in the supply of services are foreseeable, the Consultant shall notify CAFCE in order that other remedial action may be authorized in time to prevent delay in performance of the work. In the event of failure to notify CAFCE, CAFCE reserves the right to substitute more readily available services of a similar character at no increase to the Contract Price.

5.58 Change Orders

CAFCE, without invalidating the Agreement, may make changes in the work consisting of additions or deletions to the work through the issuance of a "Change Order".

A Change Order is CAFCE's written amendment to the Agreement stating the requested changes in work; and the extent of the adjustment in the Agreement time; and the amount of adjustment to the Agreement price.

The Consultant shall not perform a change in the work without authorization from CAFCE through a Change Order directive.

Upon issuance of an approved Change Order, the Consultant agrees that additional changes for the work to be performed will be as per the agreed upon amounts.

5.59 Workmanship

When work is found incomplete or unsatisfactory, the Consultant shall rectify the condition immediately at its own expense. Periods of unsatisfactory performance shall not be paid for and where this occurs, monthly progress payments shall be pro-rated. Repeated unsatisfactory performance will not be tolerated and will constitute a breach of the Contract.

The Consultant is required to ensure that all persons employed by it in connection with the performance of the work are qualified persons capable of carrying out the work, adequately trained, fully instructed and supervised by a Supervisor who has knowledge and practical experience acceptable to CAFCE.

The decisions as to quality, fitness or workmanship in cases of dispute rest solely with CAFCE. Any worker not acceptable to CAFCE by reason of incompetence or improper conduct, or who is discovered to be a security risk, shall be excluded from the work site and replaced forthwith. CAFCE may take whatever action deemed necessary and appropriate in order to obtain satisfactory security clearance on the Consultant's employees.

5.60 Force Majeure

Neither party will be liable to the other for any failure or delays in the performance or observance of obligations caused by events beyond its reasonable control (**"Force Majeure"**), including but not limited to fires, explosions, storm, flood, earthquake, war, sabotage, general labor shortages, strikes, work stoppages or slow downs or other industrial disputes, accidents, riots or civil disturbances, acts of God, or laws or regulations imposed by any civil or military government, inability to obtain any license or consent necessary in respect of the use with any telecommunications facilities, or delays caused by carriers, suppliers or material shortages, after the date hereof.

If an event of Force Majeure occurs, the party's whose performance is directly affected, as soon as practicable, shall notify the other party in writing of the particulars thereof, and shall use its commercially reasonable efforts to remove, curtail or contain the event of Force Majeure and resume with the least possible delay the observance and performance of its obligations under the Agreement.

5.61 Non-Waiver

Failure of CAFCE to insist upon strict performance of any of the terms and conditions of this RFP shall not be deemed a waiver of any rights or remedies that CAFCE shall have in respect thereof and shall not be deemed a waiver of any subsequent default in performance of the terms and conditions hereof.

5.62 De-Briefing

Consultants may request a post proposal debriefing which will be made available at CAFCE's convenience.

5.63 Limitation of Damages

If for any reason the Consultant become liable to CAFCE for losses, damages, or costs in connection with provision of services under this Proposal, or the termination thereof, whether such liability arises in contract or in tort, other than in connection with "Patent Infringement", the aggregate liability of the Consultant shall be limited to the lesser of the actual losses, damages or costs and administrative or operational cost to replace the Consultant.

5.64 Business Registration

Consultants will be required to hold a valid license to do business in Canada, prior to the award of any Agreement.

5.65 Funding

This Request for Proposal is subject to CAFCE Executive approval and funding.

5.66 Non – Collusion

The Consultant certifies with submission of a proposal that their proposal is genuine and not a collusive proposal, or made in the interest or on behalf of any person not therein named; and further says that the said Consultant has not directly or indirectly induced or solicited any Consultant on the above work or supplies to put in a sham proposal, or any other person or corporation to refrain from presenting a proposal; and that the said Consultant has not in any manner sought by collusion to secure an advantage over any other Consultant.

5.67 Royalties and Patents

The Consultant by submitting a proposal agrees that it, at its expense, will timely defend any claim or suit instituted against CAFCE, its employees, agents or Consultant, and indemnify CAFCE, its employees, agent and Consultant from and against any award of damages, fines, profits claimed and costs (including reasonable legal fees) made in any claim or suit insofar as the same is based on a claim that the Product, Document, or Service, or any component thereof, infringes any trademark, patent, copyright, trade secret, or other intellectual property right, except to the extent the claim or suit is based on the Consultants use of software or firmware developed by CAFCE.

5.68 Invoices and Payment

Applications for Progress Payments shall be dated the last day of the agreed monthly payment period and the amount claimed shall be for the value, proportionate to the amount of the contract, of work performed and products delivered to the place of work at that date.

Where progress payments are initiated, all charges for work shall be itemized on an invoice showing actual hours work. Non-productive times such as traveling time shall be shown separately on the invoice. If materials are supplied, they shall be listed separately at the Consultant's "cost" with mark-up shown separately.

When the Consultant considers the work is completed, the Consultant shall submit an application for Final Payment.

All invoices must identify the project number, name, location of project and purchase or contract order number.

CAFCE's payment terms are net thirty (30) days of the invoice date for the portion of services rendered as per progress schedule.

Consultants are required to provide detailed progress billings at the end of each month and/or at the completion of the project/work.

CAFCE does not prepay for goods and services.

Invoices are to be submitted to the designated CAFCE representative for payment upon completion of services with terms of Net 30 days of invoice date.

Invoices submitted for payment must clearly show the Agreement Number, Fund/Org/Acct otherwise, the invoice will be returned to the Consultant unpaid.

5.69 Protection of CAFCE Property

The Consultant shall protect the work and CAFCE's property from damage that may arise as the result of the Consultant's operations under the Agreement, and shall be responsible for such damage. The Consultant shall compensate CAFCE for any loss of or damage to CAFCE's premises or property arising out of the performance of the work.

5.70 Use of CAFCE Assets

No CAFCE equipment, automobiles, credit cards, service, tools, research papers, software, materials, supplies, space, or time is to be used by any of the Consultants at any time for personal gain or for any non- CAFCE purpose without prior authorization by the CAFCE. Consultants should be aware that computer software is licensed for exclusive use by CAFCE. Copying software and its use for other than its original intended purpose is a criminal offense.

SECTION 6.0 SPECIAL TERMS AND CONDITIONS

6.1 Independent Consultant

The Consultant is an independent Contractor and neither the Consultant nor the Designated Employee is a servant, employee or Agent of CAFCE.

The Consultant will not, in any manner whatsoever, commit CAFCE to the payment of any money to any person, firm or corporation.

CAFCE may, from time to time, give such instructions as it considers necessary to the Consultant in connection with the provision of the Services, which instructions the Consultant will comply with, but the Consultant will not be subject to the control of CAFCE with respect to the manner in which such instructions are carried out except in regard to general CAFCE standards, policies and guidelines.

6.2 Pricing Terms

Prices shall be fixed and firm for the duration of the Agreement and detailed by Phase as illustrated in APPENDIX G.

6.3 Final and Best Offer

Consultants are required to provide at the time of proposal submission their “final and best offer”.

6.4 Prompt Payment

Consultant is required to specifically indicate the rate of discount that would be passed onto CAFCE for prompt payment, and the conditions under which these would apply.

6.5 Privilege Clause

CAFCE will accept all properly submitted proposals as responsive and compliant. CAFCE may waive minor irregularities only if they are deemed to be non-mandatory and do not affect the “responsive” and “compliance” provisions of tendering.

CAFCE is not bound to accept the lowest priced or any Proposal of those submitted nor is it bound to award to any Proponent or the lowest qualified Proponent. Proposals will be evaluated against the criteria indicated within this RFP. CAFCE will be under no obligation to receive further information, whether written or oral, from any Proponent. ***If a Proponent fails to meet any one or more of the mandatory requirements specified in this RFP, CAFCE will reject that Proposal without further evaluation.***

CAFCE reserves the right to:

- ❑ Reject any and all Proposals, including without limitation the lowest priced Proposal, even if the lowest priced Proposal conforms in all aspects with the RFP; and to award the Agreement to whomever CAFCE, in its sole discretion deems appropriate, notwithstanding any custom of the trade to the contrary nor anything contained in the RFP herein;

- ❑ Enter into negotiations with any one or more of the Proponent's on any or all aspects of their Proposal
- ❑ Award an Agreement in whole or in part as it deems appropriate and in its best interests
- ❑ In its sole and absolute discretion, to accept or reject any Proposal that, in the view of CAFCE, is incomplete or contains exceptions and variations to the terms and conditions of this solicitation

6.6 Other

No right or interest in an awarded Agreement shall be assigned by the successful Consultant without prior written approval of CAFCE.

No sub-contract shall be entered into by the Consultant with any other party to furnish any of the materials or service specified herein without prior written approval of CAFCE. A Consultant may use this section to bring any other matter to CAFCE's attention that would further support the proposal and/or assist in CAFCE's evaluation process.

APPENDIX A DESIGN CONSIDERATIONS

Please refer to the sample database table structure in APPENDIX B for additional information, as well as a sample input form for term-based program data and sample standardized report result layouts in APPENDIX C.

Overall Design Considerations

- 1) Separation of statistical database from cafce.ca website:
 - This statistical database will be a CAFCE members' only record of co-op student placement statistics for post-secondary institutions across Canada on a 4 month term basis, and while it should have a web-based interface, it should be completely separate from the news items, staff membership directory, searchable program directory (to give program name and contact details to members and outside parties), etc. such as exists at the current cafce.ca website. Past attempts have been made to combine such website functionality with the statistical database, with limited success.
 - Note: BC Provincial Co-op statistical database (with a web-based interface) has always existed as a separate entity from the ACE BC/Yukon website since its development in 2001, and has gone through several technology upgrades. It has continued to be a stable and useful database and all institutions in BC are regularly contributing data.
- 2) Software tools used to develop the database:
 - Consideration should be given to where the database can be hosted long term and who can provide ongoing software upgrades, IT support, administration communication, etc. for it and the costs associated with it. This may impact which software tools are used (say MySQL vs. Oracle (which would have licensing costs)).
- 3) Amount of data to be stored (at start and over potential life of database):
 - Some thought should be given to potential size of database and how this may change table design and how the data should be searched or how results of a custom search can be displayed to avoid massively long pages that require a great deal of scrolling.
 - There are over 65 institutions in the current CAFCE website, and schools have anywhere from 1-50+ programs. Schools will need to do some consolidation/grouping of their programs for the stats database though.
 - Program listings on the CAFCE website are very finely detailed so that potential employers can better find a specific type of program. For the stats database, this level of detail is not required. For example UVic has more than 225 programs organized into 28 programs on the CAFCE website for marketing purposes, and these programs are organized into 22 programs in the BC Provincial Co-op statistics database for reporting purposes, so there is some consolidation. SFU has 45 (CAFCE website) vs. 10 (BC Prov Co-op Stats Db).
 - The database should be designed in a way that permits future phases of development as new data is identified as desirable to collect.

- 4) Visual mockups in design/development process:
- Suggest developing visual mock-ups of input forms, browse and search results displays, standardized report formats, etc. for both administrative and regular users before actually finalizing database table design. Also write out all the conditions of an input form – like an input field should be a positive integer, the total of one group of fields should equal the total of another, etc. This will help in developing error handling functionality, and some error checking may be incorporated into the database table design itself.
 - The input fields and user-friendliness of the database is critical to ensuring that each institution will regularly upload the relevant data.
- 5) English/French:
- All input forms, confirmation screens, reports, help guides, etc. should be available in both official languages (French and English). CAFCE can assist with translations.

Other Design Considerations/Notes

- 1) Main types of data to be stored in database are (see .xlsx file for sample database tables):
- Institution (e.g., UVic) (admin access only)
 - Program (e.g., Computing Science at SFU) (admin access only)
 - Region (AB, BC, etc.) (admin access only)
 - Occupational Discipline (e.g., Agriculture, Arts/Humanities/Social Sciences, etc.) (admin access only)
 - Term-based work term data for each program (all users)
 - Note: this is just an initial list, other entities (and tables in database) may be needed to facilitate quick searching/reporting or to capture other data that should be stored on a term basis. It will be helpful for the designers to Suggest check data in the BC database, look again at original suggestion lists from the CAFCE International Committee (and other CAFCE members) and review what types of data requests CAFCE gets and what would support lobbying/advocacy efforts with various levels of govt., etc.
- 2) Future expansion of Occupational Discipline Codes, Regions, Institution Type or Employer Type?
- All of these entities would likely be hardcoded in the data entry forms and also reports generated by database, but consider whether they would ever need to change or have more options added (e.g., track continents as part of placements outside of Canada/USA, so a change to list of regions). This could impact the design of the underlying database tables.
- 3) Admin vs. end user functions and what data is entered/maintained by each?
- Suggest a single overall administrator for the system that has access to add/edit/delete some of the foundational data (like Institution, Program descriptions, etc.), and that can

also do all regular user functions. A single administrator (vs. multiple) is helpful in maintaining integrity of database.

- Admin would also remind institutions to enter any missing data. Usefulness of database is highly dependent on users regularly entering data.
- Suggest one login per institution for regular users for entering term-based program data for their institution, browsing/searching and running custom and standardized reports on term-based program data from all institutions.
 - Term-based program data is stored by institution, not associated with a particular staff member at an institution. So if different staff at an institution need to enter term-based program data, they would share the login to enter their own data.
 - This could be a challenging configuration, it requires all staff at an institution to be extra careful when adding/viewing/editing data so as to not alter data from other programs at their institution. (Note: This is how login is structured in the BC Provincial Database, and in the 14 years that it has been an online database, there have been no reported problems with multiple staff at a single institution sharing a login identity).

4) Initial population of data into the database and ongoing import of data from existing institutional and/or provincial databases:

- Would be time-consuming for administrator to manually enter institution and program descriptive data, so some mechanism for importing from an external file would be helpful. Need to determine whether this is a one-off load at the start-up of the database, or if it would be needed on an ongoing basis, and thus would it overwrite contents of database, update/add where fields differ, etc.?
- Similarly, some mechanism for import of term-based program data from existing institutional or provincial databases (such as BC Provincial Co-op stats database and standardized co-op software like Orbis) needs to be supported. Again, it will need to be determined if this is always a complete overwrite of existing data in the database or if the imported data updates/adds the data where fields differ.

Suggested Administrator Only Functions

1) Notes:

- Browse is just full list in alpha order and can click into an item from there to get details of the item
- Search – can fill in any or all of fields from the add record input form for that type of record. There is an advanced search help link that gives info about how to fill out fields in Search.
- Export – not necessarily a separate higher level function, but export option should exist on search results page and also from within an individual record.
- Import – not listed below, but will need to consider if it is desirable to import list of programs, list of institutions, etc. from an external file.

- Admin user can also do all functions of a regular user.
- Programs (e.g., Computer Science at UVic)
 - Add/Browse/Search/Export
 - For individual program, Edit/Delete/Export
- Institutions (e.g., SFU)
 - Add/Browse/Search/Export
 - For individual institution, Edit/Delete/Export and need way to create login id/password and reset as well. In the BC Provincial Co-op Database, the login id is the name of the institution (from a drop-down list) and the password is just a field in the Institution record and only the Administrator can change it.

Suggested User Functions

- 1) Notes:
 - Browse is just a full list in alpha order and can click into an item from there to get details of the item
 - Search – can fill in any or all of the fields from the add record input form for that type of record. There is an advanced search help link that gives information about how to fill out fields in Search.
 - Export – not necessarily a separate higher level function, but export option to external csv type file should exist on search results page and also from within an individual record. Results from the standardized reports should be exportable as well.
 - Import – not listed below, but will need to consider if want to import term-based program data from an external file.
- 2) Term Program Data (e.g., work term data at U of T for Business Co-op for Fall 2013)
 - Add/Browse/Search/Export
 - For individual term program data entry, Edit/Delete/Export (although may want to limit Delete to admin only access)
- 3) Reports (see sample standardized report results layouts)
 - 1) **Work Term Totals by Year/Term** - A national view of the total number of work terms in the Winter, Summer and Fall terms by province, institutional type and name.
 - 2) **Work Term Totals w/ Term Comparison** – Similar to the Work Term Totals by Year/Term report but adds the ability to compare termly results for each institution year over year, identifying the difference between the year over year terms by numerical value and by percentage (up to 3 terms against another 3 terms).
 - 3) **Work Terms by Employer Type** – A national view of work terms by public and private sector broken further down as follows:
 - Public Sector – Federal, Provincial & Municipal
 - Private Sector – Non-profit/Non-governmental organization & Private industry

The report will show this breakdown by province, institutional type and institutional name.

- 4) **Work Terms by Job Location** – A regional (typically by province with some groupings, also USA and International) view of work term locations further broken down by institutional type and name.
- 5) **Work Terms by Occupational Discipline** – An occupational grouping breakdown (9 disciplines are displayed such as Tech/Trades, Science, Administration/Business, etc.) further broken down by institutional type and name.
- 6) **Co-op Salary Summary** - Calculates and presents the total number of work terms and the average hourly wage by term, region, institutional type and name.
- 7) **Co-op Fee Summary** - Calculates and presents the co-op fees that students must pay by international vs. domestic, graduate vs. undergraduate, term and overall. This data is presented by region, institution type and name.
- 8) **Work Terms by Institution Type – Overall Percentage** – Calculates and presents the total number of work terms in an academic year for each institution of a particular type in one or more provinces and the percentage of placements for each such institution out of the total across the selected institutions.

- Note: There are additional reports available in BC Provincial Co-op Stats database that CAFCE may want to consider adding to the list of standardized reports.

- 4) Help Guide – can have one help guide that covers off all topics.
- 5) Cancel – need to ensure can always cancel out of action by explicit cancel button or clicking on other tab to move away from current page.
- 6) Reset – need a reset button on every data entry form in case someone has made mistakes and just wants to clear.

APPENDIX B SAMPLE DATABASE TABLES

CAFCE Statistical Database Tables - Sample				
TABLE NAME	Fields	Field Type	Field Values	Comments
Institution_Type				institution types - reports will be created with summation for each type, searching by type will be supported
	id	primary key		
	name	text	[University, College, Institute]	is this sufficient, or do we need Other category as well?
Region				regions in which student co-op placements occurred, reports will provide summation for each region, and searching by region will be supported
	id	primary key		
	name	text	[Alberta, British Columbia, Manitoba, New Brunswick, Newfoundland & Labrador, Northwest Territories, Nova Scotia, Nunavut, Ontario, Prince Edward Island, Quebec, Saskatchewan, Yukon, USA, Other Countries]	this is just provinces, USA and Other, but do we need more detail on Intl, like continents, or ?
	display_name	text	[AB, BC, MB, NB, NL, NT, NS, NU, ON, PE, QC, SK, YK, USA, Other]	this is abbreviated name for display in reports

TABLE NAME	Fields	Field Type	Field Values	Comments
Occupational Discipline				occupational discipline categories - each program lies within a specific occ discipline category
	id	primary key		
	name	text	[Agriculture, Arts/Humanities/ Social Sciences, Business/Adminis tration, Computer Science, Engineering, Health/Legal, Hospitality/Touris m/Recreation, Science, Technical/Trades]	9 categories - is this sufficient? Categories were chosen based on BC database, as well as trying to keep simple for user data entry
	code	integer >= 0		do we need actual number for any reason or to help facilitate with searching/reports?
Institution				description of single institution
	id	primary key		
	institution_type_id	foreign key		
	region_id	foreign key		
	passwd	text		
	name	text		
	display_name	text		this is abbreviated name for display in reports

	city	text		what if Institution has multiple campuses across different regions - use main only?
	province	text		
	contact_name	text		need one contact person to receive reminders about data entry
	contact_email	text		
	contact_phone	text		
TABLE NAME	Fields	Field Type	Field Values	Comments
Program				description of specific program at an institution
	id	primary key		
	institution_id	foreign key		
	Occupational_discipline_id	foreign key		does each program have only 1 occ disc code? seems to be the case
	name	text		name/occupational_discipline_id must be a unique pair for this institution
	mandatory	yes/no		should include?
	accredited	yes/no		should include?
Term_Program_Data				all data is specific to this co-op program and this term, may wish to revisit this list of data gathered as no gender, etc. demographic type data is being collected
	id	primary key		
	program_id	foreign key		
	year	4 digit integer > 0		
	term	text	[Spring, Summer, Fall]	
	enrollment_all	integer >= 0		total # students (Cdn, Perm Res & Intl) enrolled in this co-op program

	enrollment_intl	integer >= 0		total # intl students enrolled in this co-op program
	fee_ugrad_cdn	integer >= 0		co-op fee per work term for Cdn/Perm Res ugrad
	fee_ugrad_intl	integer >= 0		co-op fee per work term for Intl ugrad
	fee_grad_cdn	integer >= 0		co-op fee per work term for Cdn/Perm Res grad
	fee_grad_intl	integer >= 0		co-op fee per work term for Intl grad
	wage_hourly_avg	real >=0		average hourly wage
	num_ab	integer >= 0		number of placements in this region - AB
	num_bc	integer >= 0		etc.
TABLE NAME	Fields	Field Type	Field Values	Comments
	num_mb	integer >= 0		
	num_nb	integer >= 0		
	num_nl	integer >= 0		
	num_nt	integer >= 0		
	num_ns	integer >= 0		
	num_nu	integer >= 0		
	num_on	integer >= 0		
	num_pe	integer >= 0		
	num_qc	integer >= 0		
	num_sk	integer >= 0		
	num_yk	integer >= 0		
	num_usa	integer >= 0		
	num_other	integer >= 0		
	num_fed_gov	integer >= 0		number of placements by employer type - Fed Govt/Agencies
	num_prov_gov	integer >= 0		number of placements by employer type - Prov Govt/Agencies
	num_mun_gov	integer >= 0		number of placements by employer type - Municipal Govt/Agencies
	num_npo	integer >= 0		number of placements by employer type - Non-Profit Orgs (NPO/NGO)

	num_priv	integer >= 0		number of placements by employer type - Private Industry
NOTES:				
This is a suggested sample table structure, but the key item is that term-based program data is associated with a specific co-op program at a specific institution (and not tied to any particular co-op staff member at an institution).				
May need to duplicate some of fields from Program in Term_Program_Data for quick searching/reports generation.				
May also want to consider design that doesn't have numbers of placements by employer types and regions hardcoded as fields in Term_Program_Data table, but go look up in another table based on region_id and term_program_data_id, and create a table of Employer_Type and then similarly look up in another table based on employer_type_id and term_program_data_id. This may be too slow though for searching/reporting, but may allow for easier future expansion of the list of regions and list of employer types.				
May want/need additional tables to facilitate quick searching/reporting.				

APPENDIX C SAMPLE INPUT/OUTPUT FORMS AND STANDARDIZED REPORTS

Sample Input Form

AWARDS +

EVENTS +

ACCREDITATION +


RESOURCES +

Member Menu

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MY PROGRAMS



Co-op Program Directory


The Cooperative Education Directory is a comprehensive listing of the post-secondary co-operative education programs of member institutions in Canada.

Institution
== select ==

Program Classification
== select ==

Prov/State
== select ==

CLICK TO SEARCH



Program Profile

Program Name*

Occupational Discipline*

Year (YYYY)*

Term*

Total Number of Co-op Students Enrolled in Program

All - Undergrad & Grad

International (Visa) - Undergrad & Grad

Co-op Fees per Work Term**

Canadian/Permanent Resident
Undergrad
Grad

\$

International (Visa)
Undergrad
Grad

\$

**Co-op fee per work term is calculated by total fees paid over length of degree divided by # of work terms in degree.

Co-op Work Term Wages

Average hourly wage (\$xx.xx)
\$

Number of Work Terms by Location

Alberta

Ontario

British Columbia

Prince Edward Island

Manitoba

Quebec

New Brunswick

Saskatchewan

Newfoundland & Labrador

Yukon

Northwest Territories

USA

Nova Scotia

Other Countries

Nunavut

Number of Work Terms by Employer Type

Federal Government/Agencies

Provincial Government/Agencies

Municipal Government/Agencies

Non-Profit Organizations (NPO/NGO)

Private Industry

SUBMIT

CANCEL

RESET

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Sample Output Form

ACCREDITATION +


RESOURCES +

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ELECTIONS

MY PROGRAMS



Co-op Program Directory

The Co-operative Education Directory is a comprehensive listing of the post-secondary co-operative education programs of member institutions in Canada.

Institution
== select ==

Program Classification
== select ==

Prov/State
== select ==

CLICK TO SEARCH

Stats Test Program

Program Profile

Program Name			
Occupational Discipline			
Year		Term	

Total Number of Co-op Students Enrolled in Program

All - Undergrad & Grad	
International (Visa) - Undergrad & Grad	

Co-op Fees per Work Term

Canadian/Permanent Resident - Undergrad	
Canadian/Permanent Resident - Grad	
International (Visa) - Undergrad	
International (Visa) - Grad	

Co-op Work Term Wages

Average hourly wage	
---------------------	--

Number of Work Terms by Location

Alberta	
British Columbia	
Manitoba	
New Brunswick	
Newfoundland & Labrador	
Northwest Territories	
Nova Scotia	
Nunavut	
Ontario	
Prince Edward Island	
Quebec	
Saskatchewan	
Yukon	
USA	
Other Countries	

Number of Work Terms by Employer Type

Federal Government/Agencies	
Provincial Government/Agencies	
Municipal Government/Agencies	
Non-Profit Organizations (NPO/NGO)	
Private Industry	

1) Sample Standardized Report - Work Term Totals by Year/Term

Search Parameters						
Specify up to 3 Year/Term(s) * (YYYY)			Select Work Term Location(s) *		o select/de-select all	
Year/Term 1	2012	Jan-Apr	<input checked="" type="checkbox"/> Alberta <input checked="" type="checkbox"/> British Columbia <input type="checkbox"/> Manitoba <input type="checkbox"/> New Brunswick <input type="checkbox"/> Newfoundland & Labrador <input type="checkbox"/> Northwest Territories <input type="checkbox"/> Nova Scotia <input type="checkbox"/> Nunavut		<input type="checkbox"/> Ontario <input type="checkbox"/> Prince Edward Island <input type="checkbox"/> Quebec <input type="checkbox"/> Saskatchewan <input type="checkbox"/> Yukon <input type="checkbox"/> USA <input type="checkbox"/> Other Countries	
Year/Term 2	2012	May-Aug				
Year/Term 3	2012	Sept-Dec				
Submit		Cancel		Reset		
Search Results						
Search Parameters						
Year/Term(s)			Work Term Location(s)			
Year/Term 1	2012	Jan-Apr	<input checked="" type="checkbox"/> Alberta <input checked="" type="checkbox"/> British Columbia			
Year/Term 2	2012	May-Aug				
Year/Term 3	2012	Sept-Dec				
						Export
Work Term Totals by Year/Term						
Location	Institution Type	Institution Name	Number of Work Terms			
			2012 Jan-Apr	2012 May-Aug	2012 Sept-Dec	TOTAL (all year/terms)
AB	College	College A	x	y	z	x + y + z
		College B				
		College C				
		etc.				
		College SUBTOTAL				
	Institute	Institute A				
		Institute B				
		Institute C				
		etc.				
		Institute SUBTOTAL				
	University	University A				
		University B				
		University C				
		etc.				
		University SUBTOTAL				
	Location TOTAL					
BC	College	College A				
		College B				
		College C				
		etc.				
		College SUBTOTAL				
	Institute	Institute A				
		Institute B				
		Institute C				
		etc.				
		Institute SUBTOTAL				
	University	University A				
		University B				
		University C				
		etc.				
		University SUBTOTAL				
	Location TOTAL					
OVERALL TOTAL						
TOTALS BY INSTITUTION TYPE for selected location(s)						
Institution Type	Number of Work Terms					
	2012 Jan-Apr	2012 May-Aug	2012 Sept-Dec	TOTAL (all year/terms)		
College						
Institute						
University						
OVERALL TOTAL						

2) Sample Standardized Report - Work Term Totals w/ Term Comparison – up to 3 terms against another 3 terms

Search Parameters														
Specify up to 3 Year/Term(s) as 'Base Stats' *					Specify up to 3 Year/Term(s) as 'Comparison Stats' *					Select Work Term Location(s) *				
(YYYY)					(YYYY)					o select/de-select all				
Year/Term 1A	2012	Jan-Apr	→ compare to:	Year/Term 2A	2013	Jan-Apr	<ul style="list-style-type: none"> Alberta British Columbia Manitoba New Brunswick Newfoundland & Labrador Northwest Territories Nova Scotia Nunavut 			<ul style="list-style-type: none"> Ontario Prince Edward Island Quebec Saskatchewan Yukon USA Other Countries 				
Year/Term 1B	2012	May-Aug	→ compare to:	Year/Term 2B	2013	May-Aug								
Year/Term 1C	2012	Sept-Dec	→ compare to:	Year/Term 2C	2013	Sept-Dec								
Submit					Cancel					Reset				

Search Results														
Search Parameters					Work Term Location(s)									
Year/Term(s)					Comparison Year					Work Term Location(s)				
Base Year					Comparison Year									
Year/Term 1A	2012	Jan-Apr	→ compare to:	Year/Term 2A	2013	Jan-Apr	<ul style="list-style-type: none"> Alberta British Columbia 							
Year/Term 1B	2012	May-Aug	→ compare to:	Year/Term 2B	2013	May-Aug								
Year/Term 1C	2012	Sept-Dec	→ compare to:	Year/Term 2C	2013	Sept-Dec								
Export														

Year/Term Comparison of Work Term Totals																		
Location	Institution Type	Institution Name	2012 Jan-Apr vs. 2013 Jan-Apr				2012 May-Aug vs. 2013 May-Aug				2012 Sept-Dec vs. 2013 Sept-Dec				Number of Work Terms			
			1A	2A	2A-1A	%((2A-1A)/1A)	1B	2B	2B-1B	%((2B-1B)/1B)	1C	2C	2C-1C	%((2C-1C)/1C)	1T=1A+1B+1C	2T=2A+2B+2C	2T-1T	%((2T-1T)/1T)
			Number of Work Terms 2012 Jan-Apr	Number of Work Terms 2013 Jan-Apr	Difference between Year/Terms	% Change between Year/Terms	Number of Work Terms 2012 May-Aug	Number of Work Terms 2013 May-Aug	Difference between Year/Terms	% Change between Year/Terms	Number of Work Terms 2012 Sept-Dec	Number of Work Terms 2013 Sept-Dec	Difference between Year/Terms	% Change between Year/Terms	TOTAL Base Year	TOTAL Comparison Year	OVERALL Difference (Comparison Year minus Base Year)	OVERALL % Change (Comparison Year to Base Year)
AB	College	College A																
		College B																
		College C																
		etc.																
	Institute	College SUBTOTAL																
		Institute A																
		Institute B																
		Institute C																
	University	etc.																
		Institute SUBTOTAL																
University A																		
University B																		
	University C																	
	etc.																	
	University SUBTOTAL																	
	Location TOTAL																	
BC	College	College A																
		College B																
		College C																
		etc.																
	Institute	College SUBTOTAL																
		Institute A																
		Institute B																
		Institute C																
	University	etc.																
		Institute SUBTOTAL																
University A																		
University B																		
	University C																	
	etc.																	
	University SUBTOTAL																	
	Location TOTAL																	
OVERALL TOTAL																		

TOTALS BY INSTITUTION TYPE for selected location(s)																
InstitutionType	2012 Jan-Apr vs. 2013 Jan-Apr				2012 May-Aug vs. 2013 May-Aug				2012 Sept-Dec vs. 2013 Sept-Dec				Number of Work Terms			
	1A	2A	2A-1A	%((2A-1A)/1A)	1B	2B	2B-1B	%((2B-1B)/1B)	1C	2C	2C-1C	%((2C-1C)/1C)	1T=1A+1B+1C	2T=2A+2B+2C	2T-1T	%((2T-1T)/1T)
College	Number of Work Terms 2012 Jan-Apr	Number of Work Terms 2013 Jan-Apr	Difference between Year/Terms	% Change between Year/Terms	Number of Work Terms 2012 May-Aug	Number of Work Terms 2013 May-Aug	Difference between Year/Terms	% Change between Year/Terms	Number of Work Terms 2012 Sept-Dec	Number of Work Terms 2013 Sept-Dec	Difference between Year/Terms	% Change between Year/Terms	TOTAL Base Year	TOTAL Comparison Year	Difference (Comparison Year minus Base Year)	% Change (Comparison Year to Base Year)
Institute																
University																
OVERALL TOTAL																

3) Sample Standardized Report - Work Terms by Employer Type – priv vs. public for each institution

Search Parameters										
Specify up to 3 Year/Term(s) * (YYYY)			Select Work Term Location(s) *				○ select/de-select all			
Year/Term 1	2012	Jan-Apr	<ul style="list-style-type: none"> ● Alberta ● British Columbia ○ Manitoba ○ New Brunswick ○ Newfoundland & Labrador ○ Northwest Territories ○ Nova Scotia ○ Nunavut 				<ul style="list-style-type: none"> ○ Ontario ○ Prince Edward Island ○ Quebec ○ Saskatchewan ○ Yukon ○ USA ○ Other Countries 			
Year/Term 2	2012	May-Aug								
Year/Term 3	2012	Sept-Dec								
<input type="button" value="Submit"/>			<input type="button" value="Cancel"/>				<input type="button" value="Reset"/>			

Search Results										
Year/Term(s)			Work Term Location(s)							
Year/Term 1	2012	Jan-Apr	<ul style="list-style-type: none"> ● Alberta ● British Columbia 							
Year/Term 2	2012	May-Aug								
Year/Term 3	2012	Sept-Dec								
										<input type="button" value="Export"/>

Work Term Totals by Employer Type										
Location	Institution Type	Institution Name	Number of Work Terms in Public Sector				Number of Work Terms in Private Sector			TOTAL Number of Work Terms (Public and Private Sectors)
			Federal Government/ Agencies	Provincial Government/ Agencies	Municipal Government/ Agencies	TOTAL Public Sector	Non-Profit Organizations (NPO/NGO)	Private Industry	TOTAL Private Sector	
AB	College	College A	x	y	z	x + y + z	a	b	a + b	a + b + x + y + z
		College B								
		College C								
		etc.								
		College SUBTOTAL								
	Institute	Institute A								
		Institute B								
		Institute C								
		etc.								
		Institute SUBTOTAL								
	University	University A								
		University B								
		University C								
		etc.								
		University SUBTOTAL								
	Location TOTAL									
BC	College	College A								
		College B								
		College C								
		etc.								
		College SUBTOTAL								
	Institute	Institute A								
		Institute B								
		Institute C								
		etc.								
		Institute SUBTOTAL								
	University	University A								
		University B								
		University C								
		etc.								
		University SUBTOTAL								
	Location TOTAL									
OVERALL TOTAL										

TOTALS BY INSTITUTION TYPE for selected location(s)								
Institution Type	Number of Work Terms in Public Sector				Number of Work Terms in Private Sector			TOTAL Number of Work Terms (Public and Private Sectors)
	Federal Government/ Agencies	Provincial Government/ Agencies	Municipal Government/ Agencies	TOTAL Public Sector	Non-Profit Organizations (NPO/NGO)	Private Industry	TOTAL Private Sector	
College								
Institute								
University								
OVERALL TOTAL								

4) Sample Standardized Report - Work Terms by Job Location – shows regions of placement for each institution

Search Parameters																		
Specify up to 3 Year/Term(s) * (YYYY)																		
Year/Term 1	2012	Jan-Apr																
Year/Term 2	2012	May-Aug																
Year/Term 3	2012	Sept-Dec																
<input type="button" value="Submit"/> <input type="button" value="Cancel"/> <input type="button" value="Reset"/>			Select Work Term Location(s)* <input type="radio"/> select/de-select all <div> <ul style="list-style-type: none"> • Alberta • British Columbia ○ Manitoba ○ New Brunswick ○ Newfoundland & Labrador ○ Northwest Territories ○ Nova Scotia ○ Nunavut <ul style="list-style-type: none"> ○ Ontario ○ Prince Edward Island ○ Quebec ○ Saskatchewan ○ Yukon ○ USA ○ Other Countries </div>															

Search Results																		
Search Parameters Year/Term(s) Year/Term 1: 2012 Jan-Apr Year/Term 2: 2012 May-Aug Year/Term 3: 2012 Sept-Dec																		
Work Term Location(s) <ul style="list-style-type: none"> • Alberta • British Columbia <input type="button" value="Export"/>																		

Work Term Totals by Work Term Location																			
Location	Institution Type	Institution Name	Number of Work Terms by Work Term Location																
			AB	BC	MB	NB	NL	NT	NS	NU	ON	PE	QC	SK	YT	TOTAL Canada	TOTAL USA	TOTAL Other Countries	TOTAL ALL
AB	College	College A	a	b	c	d	e	f	g	h	i	j	k	l	m	a→m	n	o	a→o
		College B																	
		College C																	
		etc.																	
	College SUBTOTAL																		
	Institute	Institute A																	
		Institute B																	
		Institute C																	
		etc.																	
	Institute SUBTOTAL																		
	University	University A																	
		University B																	
		University C																	
		etc.																	
	University SUBTOTAL																		
	Location TOTAL																		
BC	College	College A																	
		College B																	
		College C																	
		etc.																	
	College SUBTOTAL																		
	Institute	Institute A																	
		Institute B																	
		Institute C																	
		etc.																	
	Institute SUBTOTAL																		
	University	University A																	
		University B																	
		University C																	
		etc.																	
	University SUBTOTAL																		
	Location TOTAL																		
OVERALL TOTAL																			

TOTALS BY INSTITUTION TYPE for selected location(s)																		
Institution Type	Number of Work Terms by Work Term Location																	
	AB	BC	MB	NB	NL	NT	NS	NU	ON	PE	QC	SK	YT	TOTAL Canada	TOTAL USA	TOTAL Other Countries	TOTAL ALL	
College																		
Institute																		
University																		
OVERALL TOTAL																		

5) Sample Standardized Report - Work Terms by Occupational Discipline

Search Parameters												
Specify up to 3 Year/Term(s) * (YYYY)			Select Work Term Location(s) *						<input type="radio"/> select/de-select all			
Year/Term 1	2012	Jan-Apr	<input checked="" type="radio"/> Alberta <input checked="" type="radio"/> British Columbia <input type="radio"/> Manitoba <input type="radio"/> New Brunswick <input type="radio"/> Newfoundland & Labrador <input type="radio"/> Northwest Territories <input type="radio"/> Nova Scotia <input type="radio"/> Nunavut						<input type="radio"/> Ontario <input type="radio"/> Prince Edward Island <input type="radio"/> Quebec <input type="radio"/> Saskatchewan <input type="radio"/> Yukon <input type="radio"/> USA <input type="radio"/> Other Countries			
Year/Term 2	2012	May-Aug										
Year/Term 3	2012	Sept-Dec										
<input type="button" value="Submit"/>			<input type="button" value="Cancel"/>						<input type="button" value="Reset"/>			

Search Results												
Search Parameters			Work Term Location(s)									
Year/Term(s)												
Year/Term 1	2012	Jan-Apr	<input checked="" type="radio"/> Alberta <input checked="" type="radio"/> British Columbia									
Year/Term 2	2012	May-Aug										
Year/Term 3	2012	Sept-Dec										
												<input type="button" value="Export"/>

Work Term Totals by Occupational Discipline												
Location	Institution Type	Institution Name	Number of Work Terms by Occupational Discipline									
			Agriculture	Arts/ Humanities/ Social Sciences	Business/ Admin	Computer Science	Engineering	Health/ Legal	Hospitality/ Tourism/ Recreation	Science	Technical/ Trades	TOTAL All
AB	College	College A	a	b	c	d	e	f	g	h	i	a→i
		College B										
		College C										
		etc.										
		College SUBTOTAL										
	Institute	Institute A										
		Institute B										
		Institute C										
		etc.										
		Institute SUBTOTAL										
	University	University A										
		University B										
		University C										
		etc.										
		University SUBTOTAL										
		Location TOTAL										
BC	College	College A										
		College B										
		College C										
		etc.										
		College SUBTOTAL										
	Institute	Institute A										
		Institute B										
		Institute C										
		etc.										
		Institute SUBTOTAL										
	University	University A										
		University B										
		University C										
		etc.										
		University SUBTOTAL										
		Location TOTAL										
OVERALL TOTAL												

TOTALS BY INSTITUTION TYPE for selected location(s)											
Institution Type	Number of Work Terms by Occupational Discipline										
	Agriculture	Arts/ Humanities/ Social Sciences	Business/ Admin	Computer Science	Engineering	Health/ Legal	Hospitality/ Tourism/ Recreation	Science	Technical/ Trades	TOTAL All	
College											
Institute											
University											
OVERALL TOTAL											

6) Sample Standardized Report - Co-op Salary Summary

Search Parameters										
Specify up to 3 Year/Term(s) * (YYYY)				Select Work Term Location(s)* <input type="radio"/> select/de-select all						
Year/Term 1	2012	Jan-Apr		<input checked="" type="radio"/> Alberta <input checked="" type="radio"/> British Columbia <input type="radio"/> Manitoba <input type="radio"/> New Brunswick <input type="radio"/> Newfoundland & Labrador <input type="radio"/> Northwest Territories <input type="radio"/> Nova Scotia <input type="radio"/> Nunavut		<input type="radio"/> Ontario <input type="radio"/> Prince Edward Island <input type="radio"/> Quebec <input type="radio"/> Saskatchewan <input type="radio"/> Yukon <input type="radio"/> USA <input type="radio"/> Other Countries				
Year/Term 2	2012	May-Aug								
Year/Term 3	2012	Sept-Dec								
<input type="button" value="Submit"/> <input type="button" value="Cancel"/> <input type="button" value="Reset"/>										
Search Results										
Search Parameters				Work Term Location(s)						
Year/Term(s)										
Year/Term 1	2012	Jan-Apr		<input checked="" type="radio"/> Alberta <input checked="" type="radio"/> British Columbia						
Year/Term 2	2012	May-Aug								
Year/Term 3	2012	Sept-Dec								
				<input type="button" value="Export"/>						
Co-op Salary Summary										
Location	Institution Type	Institution Name	2012 Jan-Apr		2012 May-Aug		2012 Sept-Dec		TOTAL Number of Work Terms	Overall Average Hourly Wage (\$)
AB	College	College A	x1	a1	y1	b1	z1	c1	x1 + y1 + z1	d
		College B	x2	a2						
		College C	x3	a3						
		etc.	x4	a4						
		College SUBTOTAL/AVG	x1→x4	e						
	Institute	Institute A								
		Institute B								
		Institute C								
		etc.								
		Institute SUBTOTAL/AVG								
	University	University A								
		University B								
		University C								
		etc.								
		University SUBTOTAL/AVG								
	Location TOTAL/AVERAGE									
BC	College	College A								
		College B								
		College C								
		etc.								
		College SUBTOTAL/AVG								
	Institute	Institute A								
		Institute B								
		Institute C								
		etc.								
		Institute SUBTOTAL/AVG								
	University	University A								
		University B								
		University C								
		etc.								
		University SUBTOTAL/AVG								
	Location TOTAL/AVERAGE									
OVERALL TOTAL/AVERAGE										
TOTALS BY INSTITUTION TYPE for selected location(s)										
Institution Type		2012 Jan-Apr		2012 May-Aug		2012 Sept-Dec		TOTAL Number of Work Terms	Overall Average Hourly Wage	
College		Number of Work Terms	Average Hourly Wage	Number of Work Terms	Average Hourly Wage	Number of Work Terms	Average Hourly Wage			
Institute										
University										
OVERALL TOTAL/AVERAGE										

7) Sample Standardized Report - Co-op Fee Summary

Search Parameters																	
Specify up to 3 Year/Term(s)* (YYY)										Select Work Term Location(s)* o select/de-select all							
Year/Term 1		2012		Jan-Apr						<input checked="" type="radio"/> Alberta <input checked="" type="radio"/> British Columbia <input type="radio"/> Manitoba <input type="radio"/> New Brunswick <input type="radio"/> Newfoundland & Labrador <input type="radio"/> Northwest Territories <input type="radio"/> Nova Scotia <input type="radio"/> Nunavut		<input type="radio"/> Ontario <input type="radio"/> Prince Edward Island <input type="radio"/> Quebec <input type="radio"/> Saskatchewan <input type="radio"/> Yukon <input type="radio"/> USA <input type="radio"/> Other Countries					
Year/Term 1		2012		May-Aug													
Year/Term 1		2012		Sept-Dec													
Submit										Cancel				Reset			

Search Results																			
Search Parameters										Work Term Location(s)									
Year/Term(s)		2012		Jan-Apr								<input checked="" type="radio"/> Alberta <input checked="" type="radio"/> British Columbia							
Year/Term 2		2012		May-Aug															
Year/Term 3		2012		Sept-Dec															
Export																			

Co-op Fee Summary																		
Location	Institution Type	Institution Name	AVERAGE Co-op Fee per Work Term															
			2012 Jan-Apr				2012 May-Aug				2012 Sept-Dec				OVERALL AVERAGE			
			Cdn/Permanent Resident Undergrad	Cdn/Permanent Resident Grad	International (Visa) Undergrad	International (Visa) Grad	Cdn/Permanent Resident Undergrad	Cdn/Permanent Resident Grad	International (Visa) Undergrad	International (Visa) Grad	Cdn/Permanent Resident Undergrad	Cdn/Permanent Resident Grad	International (Visa) Undergrad	International (Visa) Grad	Cdn/Permanent Resident Undergrad	Cdn/Permanent Resident Grad	International (Visa) Undergrad	International (Visa) Grad
AB	College	College A				a												
		College B				b												
		College C				c												
		etc.				d												
		College AVERAGE				e												
	Institute	Institute A																
		Institute B																
		Institute C																
		etc.																
		Institute AVERAGE																
	University	University A																
		University B																
		University C																
		etc.																
		University AVERAGE																
	Location AVERAGE																	
BC	College	College A																
		College B																
		College C																
		etc.																
		College AVERAGE																
	Institute	Institute A																
		Institute B																
		Institute C																
		etc.																
		Institute AVERAGE																
	University	University A																
		University B																
		University C																
		etc.																
		University AVERAGE																
	Location AVERAGE																	
OVERALL AVERAGE																		

AVERAGES BY INSTITUTION TYPE for selected location(s)																	
Institution Type	AVERAGE Co-op Fee per Work Term																
	2012 Jan-Apr				2012 May-Aug				2012 Sept-Dec				OVERALL AVERAGE				
	Cdn/Permanent Resident Undergrad	Cdn/Permanent Resident Grad	International (Visa) Undergrad	International (Visa) Grad	Cdn/Permanent Resident Undergrad	Cdn/Permanent Resident Grad	International (Visa) Undergrad	International (Visa) Grad	Cdn/Permanent Resident Undergrad	Cdn/Permanent Resident Grad	International (Visa) Undergrad	International (Visa) Grad	Cdn/Permanent Resident Undergrad	Cdn/Permanent Resident Grad	International (Visa) Undergrad	International (Visa) Grad	
College																	
Institute																	
University																	
OVERALL AVERAGE																	

8) Sample Standardized Report – Work Terms by Institution – Overall Percentage

Search Parameters				
Specify up to 3 Years*		Select Institution Type*		Select Institution Location(s)*
(YYYY)				<input type="radio"/> select/de-select all
Year 1	<input type="text" value="2011"/>	<input checked="" type="radio"/> All <input type="radio"/> College <input type="radio"/> Institute <input type="radio"/> University		<input checked="" type="radio"/> Alberta <input checked="" type="radio"/> British Columbia <input type="radio"/> Manitoba <input type="radio"/> New Brunswick <input type="radio"/> Newfoundland & Labrador <input type="radio"/> Northwest Territories <input type="radio"/> Nova Scotia <input type="radio"/> Nunavut
Year 2	<input type="text" value="2012"/>			<input type="radio"/> Ontario <input type="radio"/> Prince Edward Island <input type="radio"/> Quebec <input type="radio"/> Saskatchewan <input type="radio"/> Yukon
Year 3	<input type="text" value="2013"/>			
<input type="button" value="Submit"/>		<input type="button" value="Cancel"/>		<input type="button" value="Reset"/>

Search Results				
Search Parameters				
Years		Institution Type		Location(s)
Year 1	<input type="text" value="2011"/>	<input checked="" type="radio"/> All		<input checked="" type="radio"/> Alberta <input checked="" type="radio"/> British Columbia
Year 2	<input type="text" value="2012"/>			
Year 3	<input type="text" value="2013"/>			
				<input type="button" value="Export"/>

Work Terms by Institution Type								
Institution Type	Province	Institution Name	Number of Work Terms					
			2011	% Of Total 2011	2012	% Of Total 2012	2013	% Of Total 2013
College	AB	College A	a	a/overall total *100				
		College B	b	b/overall total *100				
		College C	c	c/overall total *100				
		etc.	...					
		Province SUBTOTAL	a+b+c+...	(a+b+c+...)/overall total *100				
	BC	College A	x	x/overall total *100				
		College B	y	y/overall total *100				
		College C	z	z/overall total *100				
		etc.	...					
		Province SUBTOTAL	x+y+z+...	(x+y+z+...)/overall total *100				
		College SUBTOTAL	a+b+c+x+y+z+...	(a+b+c+x+y+z+...)/overall total *100				
Institute	AB	Institute A						
		Institute B						
		Institute C						
		etc.						
		Province SUBTOTAL						
	BC	Institute A						
		Institute B						
		Institute C						
		etc.						
		Province SUBTOTAL						
		Institute SUBTOTAL						
University	AB	University A						
		University B						
		University C						
		etc.						
		Province SUBTOTAL						
	BC	University A						
		University B						
		University C						
		etc.						
		Province SUBTOTAL						
		University SUBTOTAL						
		College SUBTOTAL + Institute SUBTOTAL + University SUBTOTAL						
		OVERALL TOTAL		100%		100%		100%

APPENDIX D PROPOSAL SUBMISSION FORM

REQUEST FOR PROPOSAL

In order to be entitled to consideration, this Proposal must be signed and submitted by:

May 15, 2015 at 3:00:00 P.M. EASTERN STANDARD TIME

Canadian Association for Co-operative Education (CAFCE)

720 Spadina Ave, Suite 202

Toronto, Ontario, M5S 2T9

Fax Proposals will not be accepted.

Email Proposals will be accepted. (cafce@cafce.ca)

I/We hereby offer to provide the noted services to the Canadian Association for Co-operative Education upon the terms and conditions set out and/or referred to herein, and including any addenda acknowledged as received.

Name of Firm:

Name (Print or type)

Title:.....

Signature:

Date:

Telephone:.....

Fax:

Email:

Signed: _____

Date: _____

CONSULTANT INFORMATION

Company Name:

Address:

Telephone No:

Fax No:

Type of Business:

Names of Representatives

Manager:

Sales:

Accounting:

Pertinent Data

Business Licenses No:

Municipality of Issue:

HST No:

GST No:

PST No:

WCB No:

Consultant Additional Comments/Information

Signature:

Date :

APPENDIX E RFP EVALUATION CRITERIA AND MATRIX

<u>%</u>	<u>Criterion</u>	<u>Factor</u>	<u>Weight (1-5)</u>	<u>Rating (1-10)</u>	<u>Point Score Weight × Rating</u>	<u>Comment</u>
	Mandatory	(see list in Section 4.5.1)				
10%	Corporate Capability & Company Qualifications. Terms and Conditions	<ul style="list-style-type: none"> - Organizational - Financial stability and profile - Marketplace credentials - Canadian presence - Corporate commitment - Track record - similar projects - Track record joint venture/prime Supplier/Service Provider - Assessment of the qualifications and track record of sub-Consultants - Corporate profile - Sub-Consultants' alliances and consortiums - References - Annual reports - Audited financial statement - Employee Confidentiality Agreement - Cover Letter and Executive Summary 				
30%	Business Process & Application Solution Minimum upset score - 65% of the total allotted point score.	<ul style="list-style-type: none"> - Extent which proposed solution supports the business requirements identified - Functional requirements expressed in Response Format Document 				

	<u>Criterion</u>	<u>Factor</u>	<u>Weight (1-5)</u>	<u>Rating (1-10)</u>	<u>Point Score Weight × Rating</u>	<u>Comment</u>
30%	Technical Solution Minimum upset score - 65% of the total allotted point score	<ul style="list-style-type: none"> - Extent to which the proposed solution supports the business requirement (Section 1 of the RFP) - Ability to host all database related servers within Canada - Specific technical requirements expressed in the Response Format document - Assessment of Consultant technical qualifications - technical experience 				
10%	Approach and Implementation Strategy	<ul style="list-style-type: none"> - Consultant understanding of the scope and impact of this initiative - Completeness of the approach and implementation strategy proposed - Assesses use of methodologies - Capabilities in the area of business analysis - Large systems development and implementation 				
10%	Project Organization, Team and Project Management	<ul style="list-style-type: none"> - Project organization proposed - Background, skills and experience of personnel assigned to the project - Project management capability and experience of the team proposed 				
10%	Benefits and Costs	<ul style="list-style-type: none"> - Benefit internal stakeholders - Meet or exceed program goals (Section 1 of RFP) - Firm pricing of each Phase - Completeness of pricing proposed 				
	TOTALS					

APPENDIX F CONSULTANT REFERENCES FORM

<i>Company Name</i>	
<i>Address:</i>	<i>Telephone Number:</i>

Provide sufficient references to cover the individual reference requests within the RFP. A reference can be used for more than one purpose, but a minimum of three business references and one banking reference is required.

1. COMPANY NAME:	
Contact Name:	
Title:	
Phone:	
Comments:	(Highlight why you are using this organization as a reference.)
2. COMPANY NAME:	
Contact Name:	
Title:	
Phone:	
Comments:	(Highlight why you are using this organization as a reference.)
3. COMPANY NAME:	
Contact Name:	
Title:	
Phone:	
Comments:	(Highlight why you are using this organization as a reference.)

APPENDIX G

PRICING AND PROJECT COSTING

Proponents are to provide comprehensive firm fixed prices and overall project costs for each element or phase identified within their project plan, deliverable or milestone with breakdowns for all categories of service as illustrated in **Appendix A** and detailed in the **Scope of Work**.

Consultants are required to provide details on all elements of cost for the following categories by specific Phases of the Project:

Consultant Fees:	By individual level of consultant; hourly, per diem, fixed price, etc. CAFCE does not allow contingency or bonus based fee structures.
Out of Pocket Expenses:	Specify types of expenses and projected costs.
Travel:	Where applicable and with prior approval – indicate anticipated travel requirements and projected costs.
Facilities & Equipment:	Indicate office space required and equipment by type – project costs for non-CAFCE supplied facilities and equipment. Includes office space.
Hardware & Software:	Indicate items required and projected costs for non- CAFCE supplied items.
Internet & Intranet:	As noted above.
Photocopiers & Printing:	Indicate requirements and associated costs if not supplied by CAFCE.
Telecommunications:	Indicate requirements and associated costs if not supplied by CAFCE.
Parking:	Indicate requirements and associated costs if not supplied by CAFCE.
Other:	Indicate requirements and associated costs.
Taxes:	Relevant Canadian taxes apply.