Request for Proposals (RFP)

Scope of Service

Resource Scheduling System

RFP #

2018RFP-35

RFP issued by

First Nations Health Authority (FNHA)

Issue date

December 11, 2017

Closing date/time

Proposals must be received before 16:00 hours (4:00 pm) Pacific Time on: January 12, 2018

FNHA Contact Information and Questions

All enquiries related to this RFP including any requests for information, questions, and clarification, are to be directed to the following email address: fnha.contracts@fnha.ca indicating the RFP number in the subject line of the email. Please direct any questions related to the RFP to Procurement and Contracting (the "Contact Person")

FNHA will accept questions up to five business days prior to the closing date of this RFP. Any questions received after this day, FNHA may respond if time permits. Information obtained from any other source is not official and should not be relied upon. Enquiries and any responses will be recorded and may be distributed to all Proponents at the FNHA’s option.

Delivery of proposals ("Closing Location")

Submissions are to be uploaded directly by logging onto the Bonfire electronic bidding system at https://fnha.bonfirehub.ca/opportunities.

Short Listed Proponents

For those Proponents which have not been contacted by end of business day on February 2, 2018, will serve as notice that their proposal submission was unsuccessful.

Successful Proponent Notified

Week of Jan. 29, 2018

Expected Start Date of Project: February 1, 2018

Expected End Date of Project: August 31, 2018

Proponent’s submissions

A person authorized to sign on behalf of the proponent must complete and sign the Proponent Section (below), leaving the rest of this page otherwise unaltered and include the originally-signed and completed page with the first copy of the proposal.

Proponent Section

To be completed by proponent and included as the “cover page” of the Proponents Response

The enclosed proposal is submitted in response to the above-referenced RFP including any addenda. Through submission of this proposal we agree to all of the terms and conditions of this RFP and agree that any inconsistencies in our proposal will not be considered. We have carefully read and examined the RFP including the Administrative Section and have conducted such other investigations as were prudent and reasonable in preparing the proposal. We agree to be bound by the statements and representations made in our proposal.

Signature of Authorized Representative: ____________________________

Legal Name of Proponent (and Doing Business As Name, if applicable): ____________________________

Printed Name of Authorized Representative: ____________________________

Address of Proponent: ____________________________

Title: ____________________________

Date: ____________________________

Authorized Representative email address (if available): ____________________________

Authorized Representative phone, fax (if available): ____________________________
Request for Proposal – Resource Scheduling System

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1. Summary of the Requirement

The First Nations Health Authority (FNHA) requires a Nursing Resource Scheduling solution.

The terms and conditions applicable to this RFP are identified in Appendix A – Definitions and Administrative Requirements. Submission of a proposal in response to this RFP indicates acceptance of all terms and conditions that are included in Appendix A, and any addenda subsequently issued by the FNHA. Provisions in proposals that contradict any of the terms of this RFP will be as if not written and do not exist.

FNHA is seeking a Resource Scheduling solution to help manage resources; understand when resources are available to do the work, the skills required and when the resources are required. For the initial scope of this solution Nursing Resource Scheduling will be implemented. FNHA may explore implementing the tool to other employee groups.

By implementing a scheduling tool, Nursing Services aims to improve service quality by automating resource scheduling for nurses at FNHA. This will lead to improvements in a number of areas, namely:

- The ease and timeliness of preparing and updating the schedule;
- Ensure gaps or deficiencies in the schedule are identified as soon as possible and resources can be allocated to fill needs;
- Ensuring that all relevant staff and other users are notified of changes and can submit changes in a timely manner in order to efficiently manage their own work;
- Improve the reporting of time and allow easier reconciliation to Payroll and other systems; and
- Ability to work offline when online services is not available and have the information upload to the application once online services is available.

An electronic resource scheduling or workforce management system could address the challenges created by the manual process. An electronic system would create efficiencies, time savings, and reduce manual error and correction effort. Because time and labor management falls under the realm of Payroll and HR, and taking into account that the existing systems supporting these areas, the direction is to look for a scalable solution with Nursing as the first focus. Key considerations includes Business Rules coming from the Labor Code, Collective Bargaining Agreements (Unions), etc.

2. Background, Objectives and Scope

The FNHA is the first province-wide health authority of its kind in Canada. FNHA aims to reform the way health care is delivered to BC First Nations and help improve health and wellbeing.

This FNHA has taken over the administration of federal health programs and services previously delivered by Health Canada’s First Nations Inuit Health Branch – Pacific Region. FNHA has a broad mandate to work with the province and First Nations to improve health services and address service gaps through new partnerships, closer collaboration, and health systems innovation.

Our vision is that all First Nations and Aboriginal people in BC, no matter where they live, are supported in achieving and maintaining wellness (physical, mental and spiritual) in ways that respects their customs, values and beliefs.

FNHA intends to procure a solution/service to support scheduling for our staff. The first phase is for the Nursing Group within FNHA.

Currently, the resource administrator creates, updates, and manages schedules for the nurses and provides the schedules to the management team for review and tracking. Despite the complexity for completing these schedules, paper, pencil, and MS Excel templates are currently used to create scheduling for 20 nursing stations and health centres.
The scheduling complexity is caused by:

- Nursing rotation schedules
- Vacation accrued, sick time, leave, regular work, overtime, call-back and on-call hours
- Availability of resources during stat holidays
- Different work schedules, i.e. temp, casual, part-time, full-time
- Different type of staff i.e. regulars and contractors
- Nurse location – inbound, outbound, duration of stay
- Mode of travel – ferry, plane, car
- Availability of mode of travel – certain travel modes are available based on date and season
- Certifications, training, courses, etc.

These complexities lead to a number of subsequent changes having to be made to the master schedule making direct entry into MS Excel impractical as changes occur. The Resource Administrator then has to duplicate this work by copying the schedule changes to MS Excel at a later point so that updates can be posted. It requires numerous emails and phone calls to keep the schedule and the teams updated. The complexity of the manual process and the volume of changes also make it laborious to reconcile the staff schedule with the timesheet, which are subsequently submitted by the nursing staff.

There is only one dedicated Resource Administrator managing the scheduling, though there is some limited administrative backup. This concentration of effort and knowledge adds to the overall risks in preparing and managing the schedules.

An electronic resource scheduling or workforce management system could address the challenges created by the manual process. An electronic system would create efficiencies, time savings, and reduce manual error correction effort.

A brief market survey was conducted through an initial RFEOI and discussion with the winning proponent identified the typical capabilities of existing market solutions and found that they broadly matched the functionality required by FNHA Nursing. In addition to this review the capability of the in-house PeopleSoft system was discussed with the HCM team and on review it was found that PeopleSoft removed support for their scheduling solution after V8.9 which would cause issues from an implementation, sustainment and long-term solution perspective.

**FNHA Technology Stack and Standards (Summary)**

The following is a summary listing of the FNHA technology stack relevant to this project:

- SharePoint 2013 (planning on migration to 2016)
- Windows Server 2012 r2
- SQL Server 2012
- Desktop environment – Windows 10/Windows 7
- Supported Browsers – IE (preferred), Firefox and/or Chrome
- Active Directory 2008 r2
- Exchange 2013
- VM / VMM – Microsoft System Center 2012 R2
- PeopleSoft 9.2

### 3. Services

The Contractor shall provide the following services:

1. Ability for nursing resources to work online and the ability to work offline when connectivity is lost with the ability to synchronize the information once connectivity to the network is established;
2. Self-service options will decrease the number of emails and phone calls to the resource administrator, while allowing staff to generate their own prospective schedules;
3. Ability to schedule Community-based staff based on their location and include factors such as: accessibility, weather, amenities, family, etc.;
4. Ability for staff to access current information instantly and avoid back and forth conversations and constant updates. Generating resource metrics for reports and analysis allows for efficient, proactive resource planning, including future tie-ins with on-site work activity metrics;

5. Role management, assignment and resource pooling ensures minimum required staffing levels and types are present at each site as required to meet a set standard of care; with a sandbox to test changes;

6. Automatic assignment of staff with notifications to the resource administrator on updates saves time and reduces potential for error. Workflow to approve updates can be used to control granular components, e.g. approving scheduling a contract nurse from the resource pool to fill in for a nurse who is on sick leave;

7. Ability to accommodate Clinical resource rotations as outlined by rotation schedule and resource capabilities. For example: Staff scheduled for a rotation requiring 4 weeks off, 6 weeks on; 5 weeks on, 5 weeks off etc.;

8. Ability to maintain up-to-date licenses, certifications, training and courses (professional development units), which can be mandatory, preferred or optional and vary in how long they remain valid. Tracking the requirements and setting up notifications allows for proactive engagement and check-points to avoid work stoppage due to staff needing to update requirements; accommodating nursing students without certifications but need to be scheduled;

9. Ability to track sites that may be impacted by seasonal weather and travel conditions and record estimated travel times between sites to aid scheduling;

10. Tracking (changes to) work time in the system instead of filling in additional timesheets provides convenience and decreases the multiple administrative procedures and forms to fill in. There are regular, overtime, on-call, call-back, leave, statutory, etc. hours. For contract nurses, there are also minimum hours billed for call-back and overtime activities. Vacation accrual must also be taken into account for FNHA staff; and

11. The proposed system/solution needs to be scalable/expandable to allow inclusion of other FNHA systems (i.e.: Payroll). FNHA reserves the right to have the successful Proponent implement these expanded services without issuing another competitive process.

The online system will allow exporting relevant data to the payroll system. The data export (integration) will make it easier to pay staff in a timely and accurate matter, replacing the current manual processes.

As part of identifying the need for an automated scheduling application within FNHA for nursing and agency/contract staff, a number of issues of primary concern to FNHA operations were identified. It was determined that the main areas of functionality that needed to be addressed were:

- Scheduling – the identification of required resource assignments and the matching of available qualified staff to assignments
- Time Recording – the reporting of actual hours worked, by work type as well as accounting for non-work time within scheduled hours
- Reporting – availability of information to both staff and administrators to help efficiently manage and communicative schedules

Based on preliminary discussions with the Nurse Resource Administrator and reviewing a sample of existing documents, a number of key issues were identified that impact scheduling at FNHA:

- Multiple locations
  - A key feature of FNHA’s operation is the number of locations and types of locations it services and the issues associated with remote, limited access geographic areas.
- Tentative Schedules
  - It is important, especially when booking agency staff, to be able to make proposed entries to the schedule and see the impact and decide if those entries should be actioned in the master schedule.
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- Workflows
  - There are a number of areas where workflows could feed into scheduling allowing for more automation and efficiency in the process.

- Notifications
  - FNHA staff work in locations that can have limited bandwidth or access to telecommunications, it is important that schedules are sent to staff on a regular basis so that they have an up to date version they can refer to even if out of contact and that any solution allows for limited access situations.

- Credentials
  - FNHA positions and/or locations require specific credentials or mixes of skills so it is important to ensure that any staff assigned have the relevant, up to date, qualifications and skills for the assignment.

A concept map representing the key issues and components is presented for informational purposes below:

(1) Report includes Event calendar for each individual (yearly)/OT/individual/unit/location/OT rates/ sick rates/workload/type of OT etc.

4. Deliverables

The FNHA requires the following deliverables:

At a high level, the intended solution should address the following categories / items listed.

- Resource Scheduling
  - Facilitate planning, setup, and monitoring of schedules (tentative schedules /multiple locations) to ensure adequate work coverage, meeting of staffing requirements, and prevention of over or under staffing.
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- **Time and Attendance**
  - Automate and track essential processes such as current and historical working hours, overtime, sick leave, vacation quotas.

- **Absence Management**
  - Provide a comprehensive view for planning employee absences. To minimize direct and indirect financial losses due to excessive absences, such as: the need to pay overtime, or the hiring of temporary workers.

- **Workflow & Rule Definition**
  - Ability to define workflows and business rules to improve efficiency and reliability of system processes.

- **Notifications**
  - Automatically generate timed alert and reminder notifications (email, SMS, etc.) concerning the staffing process without manual intervention.

- **Self Service**
  - Direct access to information, updates, and communication for staff and managers in matters of attendance, absences, tasks, and work schedules.

- **Reporting & Analytics**
  - Leverage the data in system within the organization to provides a comprehensive up-to-date view of the organization’s human resource performance, enabling managers to improve business practices.

- **Workforce Management**
  - Optimization of employee productivity on the individual, departmental, and entity-wide levels. Matching employee skills to specific tasks over time, quantifying the amount and types of labour needed to accomplish particular jobs on a day-to-day or hour-to-hour basis.

- **Integration**
  - Able to integrate with other FNHA systems including the payroll system.

- **Training provided for FNHA staff**
  - Key users and front line staff

5. **Responsibility and Work Performed by FNHA Staff**

The successful proponent will:

a) Have the full cooperation of First Nations Health Authority staff and access to information necessary to meet the accountabilities set out in this request for proposal and respond to reasonable inquires.

The FNHA will:

a) Provide a mutually agreed upon level of resources (human and financial resources) to the successful proponent to meet the accountabilities set out in this request for proposal.

b) The following mutually agreed upon resources will be provided by the FNHA:
   - Provide comments on milestones in a timely fashion;
   - Provide comments on progress reporting;
   - Provide feedback to the successful Proponent(s) in a timely fashion; and
   - Be available for meetings during duration of Agreement period.

6. **Proposal Format**

The following format, sequence, and instructions should be followed in order to provide consistency in Proponent response and to ensure that each proposal receives full consideration. All pages should be consecutively numbered, and as follows:

a) One (1) unaltered and completed *Request for Proposals cover page*, including Proponent Section completed in original form as per instructions;
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b) Table of contents including page numbers;

c) A short (one or two page) summary of the key features of the proposal;

d) The body of the proposal, including pricing, i.e. the “Proponent Response”; and

e) A detailed description of all costs associated with the requirements listed in this RFP.

6.1 Mandatory Items on the Proposal

Proponent responses must clearly demonstrate that they meet the following mandatory criteria or they will be excluded from further consideration during the evaluation process:

a) The Proponents proposal must be received at the closing location before the specified closing time;

b) The Proponents proposal must be in English and MUST NOT be sent by regular mail, facsimile or email;

c) Proponents must submit their submissions via the Bonfire website at: https://fnha.bonfirehub.ca/opportunities. Note that a Bonfire account is required. Visit the link above for more details and to register as a vendor.

d) Completion of the Questionnaire provided in Bonfire;

e) Proponents must submit one (1) Request for Proposals cover page, with the Proponent Section in its original form, unaltered, fully completed and signed;

f) Description of the Proponents organization, size and structure. Indicate if appropriate, if the Proponent is a small, minority-owned business or First Nations owned;

6.2 Desired Items in the Proposal

Capability of the Individuals and/or Team, including:

a) Location of the proponent (s);

b) Years and types of experience. Please also provide a description of prior experience, including the following:
   i. Names;
   ii. Addresses;
   iii. Contact persons;
   iv. Telephone numbers;

c) The type of assistance that will be required from the FNHA staff;

d) The availability of the proponent’s resources (IE staff) to ensure that deadlines are met in a timely manner;

e) Price. A detailed description of price, including: Fees, Expenses, GST, PST, and any additional taxes;

f) Work Experience – working with First Nations organizations and/or First Nations; and

g) FNHA procurement activities will be governed to ensure all vendors are treated fairly and have equal access to procurement activities; to the extent possible preference in awarding contracts will be given to First Nation organizations and/or First Nation individuals.

7. Evaluation

An evaluation committee will be formed by the FNHA and shall include employees and contractors of the FNHA. All personnel will be bound by the same standards of confidentiality.

The mandatory and desirable criteria against which proposals will be evaluated are identified in the Appendices. Proponents should ensure that they fully respond to all criteria in order to be comprehensively evaluated.

The FNHA may request and receive clarification from any Proponent when evaluating a proposal. The evaluation committee may invite some or all of the Proponents to appear before the committee in order to clarify their proposals. In such event, the evaluation committee may consider such clarifications in evaluating proposals.
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7.1 Evaluation Scoring

The following must be completed and proposals will be evaluated as identified below:

1) All responses must satisfy the Regulatory and Security Environments described herein to be considered.
2) The responses must pass all the mandatory criteria to be considered. Responses not satisfactorily meeting all mandatory requirements may be excluded from further evaluation at the discretion of the evaluation committee.
3) See table below:

<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Description</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate Criteria</td>
<td>Proponents must demonstrate that they are positioned so that services and support can be provided to FNHA over the long term.</td>
<td>5%</td>
</tr>
<tr>
<td>Financial Criteria</td>
<td>Proponents are to provide the solution that provides the best value for FNHA’s investment, and provides the required services and functionality for the lowest total cost of ownership.</td>
<td>35%</td>
</tr>
<tr>
<td>Service/Technical Criteria</td>
<td>Proponents are to demonstrate, in detail, how the proposal will meet all of FNHA’s service requirements.</td>
<td>55%</td>
</tr>
<tr>
<td>Value Adds</td>
<td>New/innovative and value added approaches to service delivery</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

7.2 Short Listed Proponents

The short-list will comprise the three highest-ranked Proponents based on the weightings for the criteria as identified above.

Proponents which are short listed may be requested to interview in person, and/or teleconference, with the assessment panel to discuss certain aspects of their submitted proposal.
Appendix A – Overview of the FNHA

The First Nations Health Authority

The first and only provincial First Nations Health Authority in Canada. Transforming health services for First Nations and Aboriginal people in BC.

Why a First Nations Health Authority?

Statistically significant health disparities exist for First Nations people in BC and across Canada with health outcomes that consistently lag behind those of other Canadians. The First Nations Health Authority aims to reform the way health care is delivered to BC First Nations to close these gaps and improve health and wellbeing.

A New Relationship with our Partners

BC First Nations, the Province of BC, and the Government of Canada have all determined that First Nations health disparities are no longer acceptable. A New Relationship between these Tripartite Partners was forged and a series of precedent-setting agreements led to the creation of a First Nations Health Authority. The FNHA is mandated by two health agreements (the Transformative Change Accord: First Nations Health Plan [2006], and the Tripartite First Nations Health Plan [2007] – collectively “the Health Plans”), the BC Tripartite Framework Agreement on First Nation Health Governance [2011] and resolutions at the annual Gathering Wisdom events and the Framework Agreement.

In 2013, the First Nations Health Authority assumed responsibility for the design and delivery of health programs and services for BC First Nations formerly delivered by Health Canada’s First Nations Inuit Health Branch – Pacific Region. The FNHA has a broad mandate to improve health services for BC First Nations through new partnerships, closer collaboration, and health systems innovation.

Making History Today and Tomorrow

As the First Nations Health Authority has assumed responsibility for the historic transfer of programs, resources, assets, staff, and responsibilities, we are developing an organization that reflects First Nations culture and philosophy. Establishing a strong foundation prepares us to innovate, transform, and redesign health service delivery with guidance from BC First Nations in the coming years.

Responsive, Visionary, Transformative

The First Nations Health Authority is part of a unique health governance structure that includes political representation and advocacy through the First Nations Health Council, and technical support and capacity development through the First Nations Health Directors Association. Collectively, this First Nations health governing structure works in partnership with BC First Nations to achieve our shared vision.

The mandate of the FNHA is to:

- Plan, design, manage, deliver and fund the delivery of First Nations Health Programs in British Columbia;
- Receive federal, provincial and other health funding for or to support the planning, design, management and delivery of First Nations Health Programs and to carry out other health and wellness related functions;
- Collaborate with the BC Ministry of Health and BC Health Authorities to coordinate and integrate their respective health programs and services to achieve better health outcomes for First Nations in British Columbia;
- Incorporate and promote First Nations knowledge, beliefs, values, practices, medicines and models of health and healing into the First Nations Health Programs, recognizing that these may be reflected differently in different regions of BC;
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- Be constituted with good governance, accountability, transparency and openness standards;
- Establish standards for First Nations Health Programs that meet or exceed generally accepted standards;
- Collect and maintain clinical information and patient records and develop protocols with the BC Ministry of Health and the BC Health Authorities for sharing of patient records and patient information, consistent with law;
- Over time, modify and redesign health programs and services that replace Federal Health Programs through a collaborative and transparent process with BC First Nations to better meet health and wellness needs;
- Design and implement mechanisms to engage BC First Nations with regard to community interests and health care needs;
- Enhance collaboration among First Nations Health Providers and other health providers to address economies of scale service delivery issues to improve efficiencies and access to health care;
- Carry out research and policy development in the area of First Nations health and wellness;
- The FNHA may undertake other functions, roles and responsibilities connected to health and wellness of First Nations and other aboriginal people in BC.

The FNHA is governed by members of the Board of Directors who collectively brings years of experience in First Nations health, community development, financial management and political expertise at all levels of government. The Board provides leadership and oversight for all corporate activities of the FNHA.

The FNHA was created in conjunction with the First Nations Health Council, providing support services while the political consensus was being built among BC First Nations. For more information please visit the website or contact us at: info@fnha.ca.
1. Definitions

Throughout this Request for Proposals, the following definitions apply:

a) "Contract" means the written agreement resulting from this Request for Proposals executed by the FNHA and the Contractor;
b) "Contractor" means the successful proponent to this Request for Proposals who enters into a written Contract with the FNHA;
c) "the FNHA" means the First Nations Health Authority;
d) "must" or "mandatory" means a requirement that must be met in order for a proposal to receive consideration;
e) "Proponent" means an individual or a company that submits, or intends to submit, a proposal in response to this Request for Proposals;
f) "Request for Proposals" or "RFP" means the process described in this document; and
g) "Should" or "desirable" means a requirement having a significant degree of importance to the objectives of the Request for Proposals.

2. Terms and Conditions

The following terms and conditions will apply to this RFP. Submission of a proposal in response to this RFP indicates acceptance of all terms that follow and that are included in any addenda issued by the FNHA. Provisions in proposals that contradict any of the terms of this RFP will be as if not written and do not exist.

3. Additional Information Regarding the RFP

Proponents are advised to fill out and return the attached Receipt Confirmation Form. All subsequent information regarding this RFP including changes made to this document will be posted on the following websites: BC Bid, Bonfire and FNHA at www.fnha.ca. It is the sole responsibility of the Proponent to check for amendments on these websites.

4. Late Proposals

Proposals will be marked with their receipt time at the closing location. Only complete proposals received and marked before closing time will be considered to have been received on time. Late proposals will not be accepted and will be returned to the Proponent. In the event of a dispute, the proposal receipt time as recorded at the closing location shall prevail.

5. Eligibility

Proposals may not be evaluated if the current or past activities or interests of the Proponent, or any sub-contractors proposed by the Proponent, may, in the FNHA’s opinion, give rise to an unresolved conflict of interest in connection with the project described in this RFP. This includes but is not limited to, involvement by a Proponent or any proposed sub-contractors in the preparation of this RFP. If a Proponent is in doubt as to whether there might be a conflict of interest, the Proponent should consult with the FNHA Contact Person identified in this RFP.

Proposals from not-for-profit agencies will be evaluated against the same criteria as those received from any other Proponents.

6. Evaluation

Evaluation of proposals will be by a committee formed by the FNHA and may include employees and contractors of the FNHA. All personnel will be bound by the same standards of confidentiality. The FNHA’s intent is to enter into a Contract with the Proponent who has the highest overall ranking based upon such an evaluation.

7. Negotiation Delay

If a written Contract cannot be negotiated within thirty days of notification of the successful Proponent, the FNHA may at its sole discretion at any time thereafter, terminate negotiations with that Proponent and either negotiate a Contract with the next qualified Proponent or choose to terminate the RFP process and not enter into a Contract with any of the Proponents.

8. Debriefing

At the conclusion of the RFP process, all Proponents will be notified. Unsuccessful Proponents may request a debriefing meeting with the FNHA. FNHA may, in its sole discretion provide such debriefing, at which time, FNHA may advise the proponent in a general manner, of the reason for the non acceptance of the proponent’s proposal. Only that Proponent’s proposal will be reviewed.

9. Alternative Solutions

If alternative solutions are offered, please submit the information in the same format, as a separate proposal.

10. Changes to Proposals

By submission of a clear and detailed written notice, the Proponent may amend or withdraw its proposal prior to the closing date and time. Upon closing time, all proposals become irrevocable. The Proponent will not change the wording of its proposal after closing and no words or comments will be added to the proposal unless requested by the FNHA for purposes of clarification.

11. Proponents’ Expenses

Proponents are solely responsible for their own expenses in preparing a proposal and for subsequent negotiations with the FNHA, if any. If the FNHA elects to reject all proposals, the FNHA will not be liable to any Proponent for any claims, whether for costs or damages incurred by the Proponent in preparing its proposal, loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

12. Limitation of Damages

Further to the preceding paragraph, by submitting a proposal, the Proponent agrees that it will not claim damages for whatever reason relating to the Contract or in respect of the competitive process, in excess of an amount equivalent to the reasonable costs incurred by the Proponent in preparing its proposal. Furthermore, by submitting a proposal the proponent further agrees to and hereby waives any claim for damages, loss of profits or loss of opportunity if no contract is made between FNHA and the proponent for any reason.
13. **Proposal Validity**
Proposals will be open for acceptance for at least one hundred and twenty (120) days after the closing date.

14. **Firm Pricing**
For the first one hundred and eighty (180) Business days into the term of the Contract, if the contracted services are offered to other health care institutions/Regional/National Groups (with similar annual volumes and delivery schedules) at a cost that is less than the current Contract Price, the Supplier agrees to reduce the Contract Price to that level. Prices will be firm for the entire Contract period unless this RFP specifically states otherwise.

15. **Currency and Taxes**
Prices quoted are to be in Canadian dollars, inclusive of duties where applicable; FOB destination with delivery charges included where applicable, and exclusive of the Goods and Services Tax (GST).

16. **Completeness of Proposal**
By submitting a proposal, the Proponent warrants that if this RFP is to design, create or provide a system or manage a program, all components required to run the system or manage the program have been identified in the proposal or will be provided by the Contractor at no charge.

17. **Sub-Contracting**
The use of a sub-contractor must be clearly defined in the proposal. This includes a joint submission by two Proponents having no formal corporate links. In such a case, one of the Proponents must be prepared to take overall responsibility for successful performance of the Contract and this must be clearly defined in the proposal.

Where applicable, the names of approved sub-contractors listed in the proposal will be included in the Contract. No additional sub-contractors will be added nor other changes made, to this list in the Contract without the written consent of the FNHA.

18. **Acceptance of Proposals**
This RFP should not be construed as an agreement to purchase goods or services. The FNHA is not bound to enter into a Contract with the Proponent who submits the lowest priced proposal, or with any Proponent. Proposals will be assessed in light of the evaluation criteria. The FNHA will be under no obligation to receive further information, whether written or oral, from any Proponent.

Neither acceptance of a proposal nor execution of a Contract will constitute approval by the FNHA of any activity contemplated in any proposal that requires any approval, permit, or license pursuant to any federal, provincial, regional district or municipal statute, regulation or by-law.

19. **Definition of Contract**
Notice in writing to a Proponent that it has been identified as the successful Proponent and the subsequent full execution of a written Contract will constitute a Contract for the goods or services. No Proponent will acquire any legal or equitable rights or privileges relative to the goods or services until the occurrence of both such events.

20. **Contract**
By submission of a proposal, the Proponent agrees that should its proposal be successful, the Proponent will enter into a Contract with the FNHA. The FNHA shall have the right to extend this Contract upon written notice to the Contractor.

21. **Contract Negotiation and Award**
Following the evaluation and recommendation of the Evaluation Committee, the First Nations Health Authority may select one or more Proponents to enter into negotiations for a Contract or Contracts as follows:

(a) The First Nations Health Authority may elect to divide the Services into more than one Contract, and enter into negotiations with a Proponent with respect to a portion of the Services, and award more than one Contract with respect to the Services;

(b) If negotiations with any Proponent are not successful within such time period as the First Nations Health Authority may require, the First Nations Health Authority may at any time after the expiry of such time period discontinue further negotiation with that Proponent by written notice to the Proponent, and the First Nations Health Authority may at any time thereafter commence negotiations with another Proponent to finalize a Contract in accordance with the foregoing process with another Proponent. The foregoing process may be undertaken and/or repeated until either a Contract or Contracts are awarded by the First Nations Health Authority or until negotiations have been terminated by the First Nations Health Authority; and

(c) FNHA reserves the right to negotiate additional services of a similar functional or technological nature from the successful Proponent without further competitive procurements.

22. **Liability for Errors**
While the FNHA has used considerable efforts to ensure information in this RFP is accurate, the information contained in this RFP is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the FNHA, nor is it necessarily comprehensive or exhaustive. Nothing in this RFP is intended to relieve Proponents from the responsibility of conducting their own investigations and research and forming their own opinions and conclusions with respect to the matters addressed in the RFP. Proponents will be solely responsible to ensure their proposal meets all requirements of the RFP, to advise FNHA immediately of any apparent discrepancies or errors in the RFP, and to request clarification if in doubt concerning the meaning or intent of anything in the RFP.

23. **Modification of Terms**
The FNHA reserves the right to modify the terms of this RFP at any time in its sole discretion. This includes the right to cancel this RFP at any time prior to entering into a Contract with the successful Proponent.

24. **Ownership of Proposals**
Proposals submitted to the FNHA become the property of the FNHA. They will be received and held in confidence by the FNHA.
25. Use of RFP
Any portion of this document or any information supplied by the FNHA in relation to this RFP may not be used or disclosed for any purpose other than for the submission of proposals. Without limiting the generality of the foregoing, by submitting a proposal, the Proponent agrees to hold in confidence all information supplied by the FNHA in relation to this RFP.

26. No Lobbying
Proponents must not attempt to communicate directly or indirectly with any employee, contractor or representative of the FNHA, including the evaluation committee and any officials of the FNHA, or with members of the public or the media, about the project described in this RFP or otherwise in respect of the RFP, other than as expressly directed or permitted by the FNHA.

27. Collection and Use of Personal Information
Proponents are solely responsible for familiarizing themselves, and ensuring that they comply, with the laws applicable to the collection and dissemination of information, including resumes and other personal information concerning employees and employees of any sub-contractors. If this RFP requires Proponents to provide the FNHA with personal information of employees who have been included as resources in response to this RFP, Proponents will ensure that they have obtained written consent from each of those employees before forwarding such personal information to the FNHA.

28. Open for Acceptance
The Proponent’s offer shall remain open for acceptance for one hundred twenty (120) Business Days from the Closing.

29. Proponents Meeting
FNHA may at their option require Proponents to attend a Proponent’s meeting and site visits to clarify the requirements as written in the RFP. Proponents will be advised when the meetings and site visits will occur.

30. Working Language
The working language of the FNHA is English and all responses to the RFP will be in English.
Request for Proposal – Resource Scheduling System

Appendix C – Receipt Confirmation Form

RFP – Resource Scheduling System

Request for Proposals # 2018RFP-35

Please fill out this form in order to advise the FNHA that you intend to submit a proposal for this RFP

FNHA CONTACT INFORMATION AND QUESTIONS: All enquiries related to this RFP including any requests for information, questions, and clarification, are to be directed to the following email address: fnha.contracts@fnha.ca.

CLOSING DATE/TIME OF RFP: Proposals must be received before January 12, 2018 16:00 hours (4:00 pm) Pacific Time.

PLEASE PROVIDE THE FOLLOWING INFORMATION ABOUT YOUR FIRM AND EMAIL TO fnha.contracts@fnha.ca no later than January 2, 2018.

Company: ________________________________________________________________
Street Address: ____________________________________________________________
City: __________________________ Postal/ZIP Code: ________________
Province/State: __________________________ Country: _________________________
Mailing Address, if different: ______________________________________________
Phone Number: (___) ________________
Contact Person: ____________________________________________________________
Title: __________________________
Email Address: ____________________________________________________________
# Request for Proposal – Resource Scheduling System

## Appendix D- Evaluation Criteria

### Corporate Criteria:

<table>
<thead>
<tr>
<th>ID</th>
<th>Area</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>CC-1</td>
<td>Corporate</td>
<td>How long has your company been in business?</td>
</tr>
<tr>
<td>CC-2</td>
<td>Corporate</td>
<td>Proponent's references (name, address, telephone number &amp; email). FNHA's preference is to have a minimum of three references. Provide contact information and names of corporate clients that Proponent has recently supplied same or similar Services.</td>
</tr>
<tr>
<td>CC-3</td>
<td>Corporate</td>
<td>Full legal name of business, GST number, and incorporation number (if applicable).</td>
</tr>
<tr>
<td>CC-4</td>
<td>Corporate</td>
<td>Please self-identify if your firm is First Nations owned (Definition of First Nations owned is if a First Nations individual(s) owns 51% or more of the company).</td>
</tr>
<tr>
<td>CC-5</td>
<td>Corporate</td>
<td>Please provide details of your experience in working with health care organizations and complex (union) collective agreements.</td>
</tr>
<tr>
<td>CC-6</td>
<td>Info only</td>
<td>Please declare if you are aware or perceive of any conflict of interest issues regarding this submission; if in doubt please contact the FNHA Contact Person. If there are none-please state in your response that there are no conflict of interest issues.</td>
</tr>
</tbody>
</table>

### Financial Criteria:

<table>
<thead>
<tr>
<th>ID</th>
<th>Area</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>FC-1</td>
<td>Financial</td>
<td>Fill in the Bid table provided in Bonfire:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1. Please provide your total fees to be charged.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Please identify travel cost and any incidental expenses that are anticipated.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. The first section is for the one-time set-up and purchase costs.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. The second section is for any ongoing recurring costing over a 5yr term.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5. Note that all columns in the table needs to be filled out. For any columns not needing a price, please enter &quot;0&quot;.</td>
</tr>
</tbody>
</table>
### Functional Criteria:

**Note:** The Functional Criteria being requested in this section is for the solution your firm is providing. If your solution does not have the below functionalities, please indicate your alternative solution and detail the functionalities of the system.

<table>
<thead>
<tr>
<th>ID</th>
<th>Area</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>F-1</td>
<td>Technical</td>
<td>Must integrate with existing Active Directory (AD) systems.</td>
</tr>
<tr>
<td>F-2</td>
<td>Technical</td>
<td>Must support granular role based authorization and access within the application, including location based rules.</td>
</tr>
<tr>
<td>F-3</td>
<td>Technical</td>
<td>Must provide secure audit trail for create, read, update &amp; delete (CRUD) access to the system.</td>
</tr>
<tr>
<td>F-4</td>
<td>Technical</td>
<td>Must support either on premise or cloud deployment models. For Cloud (SaaS) based deployment all stored data should be retained within Canada.</td>
</tr>
<tr>
<td>F-5</td>
<td>Technical</td>
<td>Must support FNHA’s Microsoft enterprise technology stack.</td>
</tr>
<tr>
<td>F-6</td>
<td>Technical</td>
<td>Must allow FNHA staff to administer users, locations and other key configuration parameters in-house.</td>
</tr>
<tr>
<td>F-7</td>
<td>Technical</td>
<td>Should provide system health metrics and dashboards for application administration by FNHA staff.</td>
</tr>
<tr>
<td>F-8</td>
<td>General</td>
<td>Must allow definition of different staff roles, and support role management and assignment.</td>
</tr>
<tr>
<td>F-9</td>
<td>General</td>
<td>Must allow definition of and use of resource pools with business rules based on pools for assignment.</td>
</tr>
<tr>
<td>F-10</td>
<td>General</td>
<td>Must to support use and management of Canadian public holidays, federal and provincial, as well as custom holidays.</td>
</tr>
<tr>
<td>F-11</td>
<td>General</td>
<td>Must support rotation based scheduling and allow definition of multiple rotation periods, e.g., 6 weeks on/4 weeks off, 5 weeks on/5 weeks off, etc.</td>
</tr>
<tr>
<td>F-12</td>
<td>General</td>
<td>Must allow configuration of business rules to manage requirements for staff assignments, locations, minimum and maximum times/resources for roles and activities.</td>
</tr>
<tr>
<td>F-13</td>
<td>General</td>
<td>Must allow configuration of work/time related rules as contained in collective agreements, defined by regulation and other agreed work practices, e.g., minimum time between shifts etc.</td>
</tr>
<tr>
<td>F-14</td>
<td>General</td>
<td>Should support resource assignment optimization.</td>
</tr>
<tr>
<td>F-15</td>
<td>General</td>
<td>Should allow rolling rotations forward to create a base schedule for future periods or new annual schedule, e.g., next year.</td>
</tr>
<tr>
<td>F-16</td>
<td>General</td>
<td>Should allow managing work locations, creation, modification and removal.</td>
</tr>
<tr>
<td>F-17</td>
<td>Multiple Locations</td>
<td>Must generate individual, site and master schedules.</td>
</tr>
<tr>
<td>F-18</td>
<td>Multiple Locations</td>
<td>Must allow staff assignment to a home location/geographic group and alternate locations they can work at including preferred locations.</td>
</tr>
<tr>
<td>F-19</td>
<td>Multiple Locations</td>
<td>Must handle staff rotations covering assignments at multiple sites within a group of locations over the same shift rotation.</td>
</tr>
<tr>
<td>F-20</td>
<td>Multiple Locations</td>
<td>Must handle restrictions based on location/type of centre such as specific credentials for attending staff and minimum staffing levels including allowing for use of supernumerary staff.</td>
</tr>
<tr>
<td>F-21</td>
<td>Multiple Locations</td>
<td>Could show expected/required travel time on schedule based on transport restrictions and location accessibility.</td>
</tr>
<tr>
<td>F-22</td>
<td>Multiple Locations</td>
<td>Should support off-line updating/caching of local schedules for syncing back to master schedule in areas with limited/low bandwidth and access; any off-line or local storage must be encrypted.</td>
</tr>
<tr>
<td>F-23</td>
<td>Multiple Locations</td>
<td>Should allow managing schedules at different geographic levels, i.e., site administrators can manage on-site staff, which feeds back to master schedule.</td>
</tr>
<tr>
<td>F-24</td>
<td>Multiple Locations</td>
<td>Should allow identification and notification to staff and administrators of scheduling issues related to travel restrictions, e.g., rotation ends before next scheduled transit option.</td>
</tr>
</tbody>
</table>
### Request for Proposal – Resource Scheduling System

<table>
<thead>
<tr>
<th>ID</th>
<th>Area</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>F-26</td>
<td>Multiple Locations</td>
<td><strong>Should</strong> handle additional location restriction information such as travel schedules; travel restrictions would include both the available modes of travel and seasonal variations.</td>
</tr>
<tr>
<td>F-27</td>
<td>Multiple Locations</td>
<td><strong>Should</strong> handle (virtual) geographical groupings at multiple levels for locations for managing assignments.</td>
</tr>
<tr>
<td>F-28</td>
<td>Notes/Ad-Hoc info</td>
<td><strong>Should</strong> allow adding searchable notes to the schedule, location, assignment or staff for the recording of ad-hoc information.</td>
</tr>
<tr>
<td>F-29</td>
<td>Tentative Schedules</td>
<td><strong>Must</strong> allow marking future assignments as tentative/unconfirmed, set confirmation reminders to be triggered prior to the assignment date and have assignment status updated in master schedule based on response.</td>
</tr>
<tr>
<td>F-30</td>
<td>Tentative Schedules</td>
<td><strong>Should</strong> allow making proposed changes to the schedule, see the impact on master schedule and confirm/reject as needed (what-if analysis, sandbox).</td>
</tr>
<tr>
<td>F-31</td>
<td>Workflows</td>
<td><strong>Must</strong> handle vacation and leave of absence request workflows.</td>
</tr>
<tr>
<td>F-32</td>
<td>Workflows</td>
<td><strong>Must</strong> highlight scheduling issues for managers when approving requests through workflow, e.g., alert if a shift would be overtime, transportation issues, etc.</td>
</tr>
<tr>
<td>F-33</td>
<td>Workflows</td>
<td><strong>Must</strong> automatically update the schedule when requests are approved or declined.</td>
</tr>
<tr>
<td>F-34</td>
<td>Workflows</td>
<td><strong>Should</strong> track general vacation entitlement and vacation balances for all vacation types.</td>
</tr>
<tr>
<td>F-35</td>
<td>Workflows</td>
<td><strong>Should</strong> track different vacation types (e.g. stats and contractual).</td>
</tr>
<tr>
<td>F-36</td>
<td>Workflows</td>
<td><strong>Should</strong> deal with shift exchange requests, including swapping of locations and use of workflows for approval/tracking.</td>
</tr>
<tr>
<td>F-37</td>
<td>Workflows</td>
<td><strong>Should</strong> allow definition of escalations/notifications within workflows.</td>
</tr>
<tr>
<td>F-38</td>
<td>Workflows</td>
<td><strong>Should</strong> allow designing and configuring workflows as required.</td>
</tr>
<tr>
<td>F-39</td>
<td>Notifications</td>
<td><strong>Must</strong> notify administrators of potential mismatches or conflicts resulting from schedule changes or proposed changes/request.</td>
</tr>
<tr>
<td>F-40</td>
<td>Notifications</td>
<td><strong>Must</strong> allow for workflow/self-service to provide notifications to administrators of staff requests.</td>
</tr>
<tr>
<td>F-41</td>
<td>Credentials</td>
<td><strong>Should</strong> track required training and courses in the schedule.</td>
</tr>
<tr>
<td>F-42</td>
<td>Credentials</td>
<td><strong>Should</strong> keep of record of credentials required for a position/assignment.</td>
</tr>
<tr>
<td>F-43</td>
<td>Credentials</td>
<td><strong>Should</strong> allow definition of credentials as mandatory, preferred or optional for a given assignment.</td>
</tr>
<tr>
<td>F-44</td>
<td>Credentials</td>
<td><strong>Should</strong> keep a record of credentials/qualifications that staff hold along with expiry dates where applicable.</td>
</tr>
<tr>
<td>F-45</td>
<td>General</td>
<td><strong>Must</strong> generate a schedule based timesheet for staff allowing recording of actual hours by exception.</td>
</tr>
<tr>
<td>F-46</td>
<td>General</td>
<td><strong>Must</strong> allow configuration of multiple time reporting codes which can be grouped for reporting purposes, e.g., multiple absence codes/work types and to book/track hours against codes.</td>
</tr>
<tr>
<td>F-47</td>
<td>General</td>
<td><strong>Must</strong> handle on call assignments and distinguish between actual hours and contractual minimum hours.</td>
</tr>
<tr>
<td>F-48</td>
<td>General</td>
<td><strong>Must</strong> import and export of data in a variety of standard formats.</td>
</tr>
<tr>
<td>F-49</td>
<td>General</td>
<td><strong>Should</strong> report on non-work time in time reporting.</td>
</tr>
<tr>
<td>F-50</td>
<td>General</td>
<td><strong>Should</strong> apply business rules to calculate overtime and other defined categories.</td>
</tr>
<tr>
<td>F-51</td>
<td>General</td>
<td><strong>Should</strong> allow managing approval/review for timesheets including reconciliation with external (agency/contractor) submitted data.</td>
</tr>
<tr>
<td>F-52</td>
<td>General</td>
<td><strong>Should</strong> calculate accrued vacation time including distinguishing between types, e.g. statutory/annual/personal, etc.</td>
</tr>
<tr>
<td>F-53</td>
<td>General</td>
<td><strong>Should</strong> interface/output to other business systems using published API’s.</td>
</tr>
<tr>
<td>F-54</td>
<td>General</td>
<td><strong>Should</strong> allow users to write/define custom reports within the system.</td>
</tr>
<tr>
<td>F-55</td>
<td>Overview</td>
<td><strong>Must</strong> allow viewing multiple (including all) locations at the same time with assignment gaps, staff types, or other items being highlighted as required (e.g. using color coding).</td>
</tr>
<tr>
<td>F-56</td>
<td>Overview</td>
<td><strong>Must</strong> have multiple views based on location and position available to different levels of staff.</td>
</tr>
<tr>
<td>F-57</td>
<td>Notifications</td>
<td><strong>Must</strong> send schedules to staff using email (any attachments should be standard formats) and/or SMS.</td>
</tr>
</tbody>
</table>

RFP # 2018RFP-35
### Request for Proposal – Resource Scheduling System

<table>
<thead>
<tr>
<th>ID</th>
<th>Area</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>F-58</td>
<td>Notifications</td>
<td><strong>Must</strong> automatically send revised schedules to staff and locations involved when changes are confirmed.</td>
</tr>
<tr>
<td>F-59</td>
<td>Notifications</td>
<td><strong>Must</strong> send notification of available assignments to permanent, casual and agency staff on a routine basis using business rules for order/priority, e.g. notify casual before agency.</td>
</tr>
<tr>
<td>F-60</td>
<td>Self-Service</td>
<td><strong>Must</strong> allow self-serve functionality to view up to date schedules and time reporting information.</td>
</tr>
<tr>
<td>F-61</td>
<td>Self-Service</td>
<td><strong>Must</strong> provide self-service functionality to non-FNHA (agency) staff.</td>
</tr>
<tr>
<td>F-62</td>
<td>Self-Service</td>
<td><strong>Could</strong> integrate with Outlook calendaring for FNHA staff or export data in standard format (e.g. ICS) to use in other calendar applications.</td>
</tr>
<tr>
<td>F-63</td>
<td>Self-Service</td>
<td><strong>Should</strong> allow self-service to accommodate multiple device types (phones, tablets, etc.) with formats available for low bandwidth/mobile viewing.</td>
</tr>
<tr>
<td>F-64</td>
<td>Other</td>
<td>If your solution does not meet one or more of the criteria listed above, please provide your alternative solution and indicate how your software meets or exceeds the requirements being requested above. Your solution should describe in detail all of the criteria being requested above and how it differs and the advantages of your system.</td>
</tr>
</tbody>
</table>

### Technical Criteria:

<table>
<thead>
<tr>
<th>ID</th>
<th>Area</th>
<th>Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>T-1</td>
<td>Privacy &amp; Security</td>
<td><strong>Must</strong> support unique user ID for authentication.</td>
</tr>
<tr>
<td>T-2</td>
<td>Privacy &amp; Security</td>
<td><strong>Must</strong> not store authentication credentials on user machine.</td>
</tr>
<tr>
<td>T-3</td>
<td>Privacy &amp; Security</td>
<td><strong>Must</strong> support application session timeout.</td>
</tr>
<tr>
<td>T-4</td>
<td>Privacy &amp; Security</td>
<td><strong>Must</strong> use secure authentication and data communication standards (i.e. SSL, HTTPS, etc.).</td>
</tr>
<tr>
<td>T-5</td>
<td>Privacy &amp; Security</td>
<td><strong>Must</strong> support configurable role based application access based on multiple factors.</td>
</tr>
<tr>
<td>T-6</td>
<td>Privacy &amp; Security</td>
<td><strong>Must</strong> support various levels of secure logging and audit trail (i.e. access, update, delete, etc.).</td>
</tr>
<tr>
<td>T-7</td>
<td>Privacy &amp; Security</td>
<td><strong>Should</strong> support pass-through authentication (i.e. single sign on authentication through Active Directory).</td>
</tr>
<tr>
<td>T-8</td>
<td>Privacy &amp; Security</td>
<td><strong>Should</strong> support integration into event and log management security management tools (e.g. LogRhythm).</td>
</tr>
<tr>
<td>T-9</td>
<td>Infrastructure</td>
<td><strong>Must</strong> provide separate backups for application and data. If your system does not provide this, provide details how your firm will mitigate this risk and the alternative approach used.</td>
</tr>
<tr>
<td>T-10</td>
<td>Infrastructure</td>
<td>If providing a cloud service, <strong>must</strong> provide backup and disaster recovery services. If it does not provide such services provide details how your firm and proposed system will mitigate this risk.</td>
</tr>
<tr>
<td>T-11</td>
<td>Infrastructure</td>
<td>Needs to have the capability to support integration with other FNHA systems (i.e.: Payroll). Outline how your system will be able to accommodate this.</td>
</tr>
</tbody>
</table>
Request for Proposal – Resource Scheduling System

<table>
<thead>
<tr>
<th>ID</th>
<th>Area</th>
<th>Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>T-12</td>
<td>Other</td>
<td>If your solution does not meet one or more of the criteria listed above, please provide your alternative solution and indicate how your software meets or exceeds the requirements being requested above. Your solution should describe in detail all of the criteria being requested above and how it differs and the advantages.</td>
</tr>
</tbody>
</table>

Service Criteria:

<table>
<thead>
<tr>
<th>ID</th>
<th>Area</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Experience</td>
<td>Where is the organization positioned amongst its peers and competitors as it relates to scheduling? Please provide sample projects to support this.</td>
</tr>
<tr>
<td>2</td>
<td>Experience</td>
<td>Provide a description of the approach and methodology taken to perform the Services indicated in this document. Please include specifications and requirements.</td>
</tr>
<tr>
<td>3</td>
<td>Experience</td>
<td>Describe any difficulties or challenges that are anticipated in providing the Services and how your firm will manage them.</td>
</tr>
<tr>
<td>4</td>
<td>Experience</td>
<td>Demonstrated experience training technical support teams and ensuring the support is available.</td>
</tr>
<tr>
<td>5</td>
<td>Experience</td>
<td>List resources who would be allocated to this project. Include copies of their CV highlighting experiences pertaining to the deliverables described in this document.</td>
</tr>
<tr>
<td>6</td>
<td>Desirables</td>
<td>Demonstrated ability to communicate effectively including cultural sensitivity in all communications.</td>
</tr>
<tr>
<td>7</td>
<td>Desirables</td>
<td>Demonstrated ability to produce high quality deliverables. Please provide sample projects to support this.</td>
</tr>
<tr>
<td>8</td>
<td>Desirables</td>
<td>Demonstrates strong interpersonal skills and ability to work collaboratively and effectively with others in a wellness-oriented organizational environment. Please provide sample projects to support this.</td>
</tr>
<tr>
<td>9</td>
<td>Desirables</td>
<td>Demonstrated ability to work independently. Please provide sample projects to support this.</td>
</tr>
<tr>
<td>10</td>
<td>Desirables</td>
<td>Demonstrated degree of flexibility and openness. Please provide sample projects to support this.</td>
</tr>
</tbody>
</table>

Value Adds:

<table>
<thead>
<tr>
<th>ID</th>
<th>Value Add</th>
<th>Indicate any value added services offered by your firm for your services; such as training, hosted user groups, access to global bulletin boards. Please provide details about these value adds.</th>
</tr>
</thead>
</table>