Hello Western Group HSQE Leads,

My name is Homa Banazadeh, and I am a Software Support co-op at Western Stevedoring. My main project is to collaborate with this group and solution providers to find affordable and sustainable software that meets our needs.

I have been tasked with helping to select a system for:

* Enhancing Safety Inspection Procedures.
* Accessing Standard Operating Procedures.
* Keeping track of user training, and sending user reminders once their training expires.

**Current system shortfalls:**

**Google Forms** **for Inspections**: The forms are easy to use, however:

* It is difficult to focus in on “bad answers”.
* Not possible to assign corrective actions.
* Not possible to generate reports.

**Eclipse Training**: To hold a variety of video training, also keeps track of training completion dates, however:

* Training tracking does not cover every type of training including in person training.
* Not possible to send auto reminders. HSQE team must check the data manually.
* Does not support uploading external training certificates.

**The requirements & scoring criterion document attached** covers all the requirements and nice-to-haves.

**Vendor Candidates**

Shortlisted list of vendors: **Velocity EHS**, **BIS Safety** and **Spence Software**. **The pricing detail document attached** shows how these were qualified, budget and functionality.

**Project Stakeholders**

* Darcy Hinds
* James Prasad
* Nelia Willis
* Dave Dunbar
* Emma Jarrett (Squamish terminals)
* Roger Dias

**Timing**

Based on your calendar availability, we have scheduled the following times:

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  |  |  | | --- | --- | --- | | Phase 2 | Kick off Meeting | **October 12,2021 – 4 to 4:30 pm** | |  | Vendor Demos | **October 14,2021 – 1 to 2 pm - BIS Safety**  **October 14,2021 – 3 to 4 pm - Spence Software**  **October 20,2021 – 1 to 2 pm – VelocityEHS** | |  | Recommendation Report | **October 20,2021** | |  |  |

**Project Scope**

**Phase 1**: Needs Assessment interview with stakeholders completed.

**Phase 2**: Select three solutions. Phase2 involves:

* Kickoff meeting to go over the project scope.
* Scheduling a demo for each vendor.
* Summarizing scores given and preparing a recommendation report.

Following completion of the project, stakeholders will convene to review the final report and make a Go/No-Go decision.

**Vendor Demos**

**The demo script & demo questions document is attached**. As vendors present, we are going to score them based on the scoring criterion from, A digital Google form will be emailed. Please score each section of scoring sheet as follows and submit the form.

* 0: Not satisfactory.
* 1: Satisfactory.
* 2: Above and beyond.

Once all the demos have taken place, I will summarize my findings in a recommendation report.

**Please review the requirements document and demo questions and let me know if you would like to add any points**. If you have any questions or concerns, feel free to contact me.

Thanks.