

Request title: Employee Recognition Platform

Request for proposals number: BCI-RFP-2024-09-16

Date of issue: September 16, 2024

Closing time: October 7, 2024 at 2:00 p.m. PST

PURPOSE

The objective of this request for proposal (RFP) is to identify a commercial off the shelf (COTS) platform to enable the deployment of a new peer-to-peer recognition program. We are looking for a partner with an existing purpose-built platform solution to deploy, enable and manage a points-based employee recognition program. We are seeking a partner that extends beyond merely providing a technology platform. In addition, the successful proponent will also be able to effectively support BCI resources in the launch and sustainment of our employee recognition program through their deep expertise in employee recognition.

The British Columbia Investment Management Corporation (BCI) intends to offer the successful Proponent a three (3) year service contract commencing from the effective date as stated in the Contract, with a maximum of two (2) additional renewal terms for a period of three (3) years each.

CLOSING LOCATION

To be considered, one complete electronic Proposal must be received by BCI before 2:00 PM PST on October 7, 2024 Closing Time through the submission method stated below (the Closing Location).

Email submission: Proponents must submit their Proposal by email to procurement@BCI.ca in accordance with the instructions set out in Section 2.2 of this request for proposal (RFP). The Proposal must include a signed Proponent Declaration Letter, and pricing should be included in a separate file.

BCI Contact Person: Raul Caballero, Senior Analyst, Strategic Sourcing

Email: procurement@BCI.ca

All communication related to this RFP must be through BCI's assigned contact person. Proponents are not to communicate directly with other involved parties regarding this RFP. Not following this process could result in the disqualification of your submission.

Contents

PURPOSE	1
1 DEFINITIONS, BACKGROUND AND REQUIREMENTS	5
1.1 Standard Definitions	5
1.2 Additional Definitions specific to this RFP	6
1.3 About the British Columbia Investment Management Corporation	6
1.4 Overview of this Opportunity.....	7
1.5 Scope of Work.....	10
1.6 Responsibilities.....	12
1.7 Project Timeline	12
1.8 Other Opportunities	12
1.9 Service Level and Data Requirements.....	13
1.10 Data Requirements.....	13
1.11 Confidentiality and Privacy	13
2 RFP PROCESS RULES	14
2.1 Acceptance of terms and conditions.....	14
2.2 Submission of proposals	14
2.3 Modification of terms.....	15
2.4 Changes to this RFP and additional information.....	15
2.5 Enquiries	15
2.6 Late proposals	16
2.7 Proposal validity	16
2.8 Currency and taxes	16
2.9 Firm pricing.....	16
Completeness of proposal	16
2.10 Changes to proposals	16
2.11 Conflict of interest.....	16
2.12 No lobbying.....	17
2.13 Subcontracting	17
2.14 Evaluation	17
2.15 Insurance requirements.....	17
2.16 Workers' compensation coverage.....	18

2.17	Contract.....	18
2.18	Contract finalization delay	19
2.19	Debriefing.....	19
2.20	Proponents' expenses	19
2.21	Limitation of damages.....	19
2.22	Liability for errors	19
2.23	No commitment to award.....	19
2.24	Required licenses	20
2.25	Legal entities	20
2.26	Reservation of rights.....	20
2.27	Ownership of proposals; confidential information.....	21
2.28	Copyright.....	21
2.29	Confidentiality agreement.....	22
2.30	Alternate solutions.....	22
2.31	Collection and use of personal information	22
2.32	Governing law	22
2.33	News releases.....	22
2.34	Forced Labour.....	22
3	RFP SCHEDULE AND OTHER INFORMATION.....	23
3.1	Schedule.....	23
3.2	Proponents' package.....	23
4	EVALUATION PROCESS.....	24
4.1	Evaluation process and methodology.....	24
4.2	Stage One – Mandatory criteria.....	25
4.3	Stage Two – Proposal assessment.....	26
4.4	Stage Three – Presentation/Interview/Demonstration.....	27
4.5	Stage Four – Deep dive	27
4.6	Stage Five – Reference Checks.....	27
4.7	Award notification and debriefing.....	28
	APPENDIX A	29
	Proposal notification form	29
	APPENDIX B	30

Proponent Proposal Guide.....	30
APPENDIX C.....	31
Proponent Declaration Letter.....	31
APPENDIX D.....	32
Corporate Profile and Mandatory Requirements.....	32
APPENDIX E.....	34
Proponent Qualifications and Experience.....	34
APPENDIX F.....	36
Project Approach and Methodology, Work Plan and Training Options.....	36
APPENDIX G.....	38
Pricing.....	38
APPENDIX H.....	39
Business Functional Requirements.....	39
APPENDIX I.....	40
Technology Questionnaire.....	40
APPENDIX J.....	41
Sample Contract.....	41
APPENDIX K.....	42
Service level and agreements.....	42
APPENDIX L.....	43
Technical Deep Dive.....	43

1 Definitions, Background and Requirements

1.1 STANDARD DEFINITIONS

Throughout this document, the following definitions will apply:

Term	Definition
Addenda	Means all additional information regarding this RFP including amendments.
BCI Contact Person	Contact person at BCI specified on the cover pages of this RFP who is authorized to respond to Proponent enquiries made before the enquiries deadline indicated in Section 3.2.
Closing Location	The location indicated on the cover pages of this RFP to submit Proposals.
Closing Time	The closing time and date specified on cover pages to submit a Proposal to this RFP.
Contract	The written agreement resulting from this RFP and executed by BCI and the Contractor.
Contractor	The successful Proponent who enters into a written Contract with BCI as a result of this RFP.
Forced Labour	Includes “forced labour” and “child labour” as those terms are defined in the Forced Labour Law.
Forced Labour Law	Means the <i>Fighting Against Forced Labour and Child Labour in Supply Chains Act</i> (Canada).
Free On Board (FOB)	A trade term that indicates whether the seller or the buyer is liable for goods that are damaged or destroyed during shipping.
Preferred Proponent	The Proponent selected through the evaluation process to award a Contract.
Proponent	A person or entity that submits, or intends to submit, a Proposal pursuant to the terms and conditions of this RFP.
Proposal	A written response to this RFP submitted by a Proponent.
Request for Proposal or RFP	The solicitation described in this document, including any attached or referenced appendices, schedules or exhibits and as may be modified in writing from time to time by BCI by Addenda or Amendment.
Resource	An individual proposed by the Proponent to perform the services.

1.2 ADDITIONAL DEFINITIONS SPECIFIC TO THIS RFP

Term	Definition
COTS	Commercial Off the Shelf
ERG	Employee Resource Groups
HRIS	Human Resource Information System

1.3 ABOUT THE BRITISH COLUMBIA INVESTMENT MANAGEMENT CORPORATION



One of Canada's largest
institutional investors



\$250.4 BILLION in gross assets
under management



29 public sector
clients



7 member Board
of Directors



Accountable to clients
for returns & fees

With \$250.4 billion of gross assets under management as of March 31, 2024, British Columbia Investment Management Corporation (BCI) is the provider of investment management services for British Columbia's public sector and one of the largest asset managers in Canada. BCI seeks investment opportunities around the world and across a range of asset classes that convert savings into productive capital. Our investment returns play a significant role in helping our institutional clients build a financially secure future for their beneficiaries.

BCI offers investment options across a range of strategies and asset classes including public and private equity, infrastructure and renewable resources, fixed income and private debt, as well as real estate equity and real estate debt through our independently operated platform company QuadReal Property Group. Further details about BCI can be accessed through our website at [www.BCI.ca](https://www.bci.ca).

1.4 OVERVIEW OF THIS OPPORTUNITY

This Request for Proposal is intended to solicit Proposals for a Recognition Platform as specified in this document. BCI is looking for an efficient, engaging, easy-to-use platform to administer, sustain and monitor a corporate Recognition Program.

1.4.1 Background

In late 2023, BCI completed an Employee Engagement Survey, and as part of the Corporate Engagement Action Plan stemming from the results of the survey, BCI is moving forward with the development of a multi-faceted employee recognition program.

Employee focus groups were conducted in June 2024 and participants spoke of the need for meaningful recognition that is frequent, specific and authentic. Employees highlighted the positive impact of recognition on their motivation when contributions are acknowledged and appreciated by their peers, managers, colleagues from other departments and senior leaders. While employees were supportive of a corporate program to create consistency, there was also a desire for flexibility to allow for consideration of individual recognition preferences.

Recognition of behaviours that demonstrate living our shared values was most frequently suggested as an anchor for the program; however, employees also see the opportunity to reinforce business priorities, drive innovation, incorporate core competencies, recognize community involvement and acknowledge achievements – providing recognition for a wide range of employee contributions. Acknowledgement of service milestones was something employees felt strongly about as they see it as an opportunity to demonstrate that BCI values retention, loyalty and commitment.

While there is desire for tangible rewards associated with recognition, employees did not focus on the high dollar values – instead it was important that rewards reflect the significance of achievements. A points-based system was commonly cited as an approach employees experienced at previous employers with the ability to redeem points for tangible rewards such as gift cards, branded merchandise, additional vacation days or make charitable donations.

During the focus groups, employees also shared suggestions on how to develop a fair and inclusive program that is accessible to all employees. They stressed the importance of clear criteria to support consistency, supported by ongoing communication to encourage and sustain participation. They want their managers to be aware of recognition received, which will help equip managers with greater insights into team members' contributions. Employees believe the program has the potential to create greater cohesion between departments and our global offices by making everyone feel like their contributions matter as part of "one BCI."

1.4.2 Current State

At present, BCI employs the following methods for employee recognition:

Shout Out

A feature on our intranet (called the Bull & Bear / B&B), enables peer-to-peer recognition and social interaction. However, in Sept 2024, a new intranet platform will be implemented – at that time, Shout Outs will be phased out and no longer available as part of our intranet platform.

Operations Connection Awards

This internal awards program encourages employees to nominate candidates in predefined categories on a quarterly basis. The successful nominees are then highlighted in a newsletter distributed across all Operations departments (*this is not a corporate-wide program that all employees participate in*). It is still to be determined if the Operations program will continue in the longer term or be incorporated into the new corporate wide recognition program.

1.4.3 Future State

BCI desires to actively foster a culture of recognition aligned with our values and achieve the following elements as part of our new program. The objectives of the Recognition Program are to:

- Increase employee engagement, strengthen our culture and support living our shared values.
- Reinforce what's important to our culture and purpose – anchor the program to our Corporate Values with opportunities to link to innovation, knowledge sharing, community engagement, inclusion, collaboration and other employee contributions & achievements.
- Provide tangible rewards that encourage program participation and reflect the significance of what's being recognized, while also promoting frequent and timely intangible recognition as part of our culture.
- Incorporate points¹ that can be used to demonstrate appreciation & recognition, with employees, managers and executives receiving an annual allocation of points to distribute. Points can be redeemed for various types of rewards that allow employees to select redemption options meaningful to them.
- Acknowledge and celebrate milestones that reflect employee's service to our clients, loyalty to the organization and the importance of retention, although without monetary points/rewards tied to milestones.
- Ensure program sustainment through ongoing communication, reminders, reporting & analytics, and campaigns to keep it relevant and top of mind for employees.

¹ Where we refer to a point-based program, we are using that term to refer to the ability to “monetize” recognition, which could be interpreted to mean dollars or “points” with a monetary value.

- Provide clear guidelines which ensure clarity, transparency, and consistency.
- Use reporting and metrics such as participation rate to assess effectiveness and identify opportunities for improvement as the program evolves and matures.

The corporate Recognition Program is not intended to fully replace other forms of recognition. As part of the implementation process, work with existing awards program to help them determine whether the new program is an opportunity to augment their existing approaches or if their program gets incorporated into the corporate program.

1.4.4 Key Capabilities

At a high-level, the key capabilities of the platform and partnership we are seeking are outlined below:

- 1) Social Feed – Employees are able to provide personalized recognition to each other that will appear on a ‘news feed’ that captures an employee recognition as it is provided. There must also be the ability for employees to manage their own individual preferences as to whether or not recognition received is public or private.
- 2) Point Distribution & Redemption – When employees provide recognition, they must have the ability to provide “points” as an option. The system will have the capability to assign point allocations, manage points distribution and track redemption and individual “point’s banks.”
- 3) Rewards Catalogue – The successful proponent will an existing online rewards catalogue that includes a variety of rewards, including gift cards, merchandise and charitable donations. BCI must be able to add our own internal custom rewards to the catalogue (i.e., vacation time).
- 4) Milestone Recognition – Using employee data, ensure that managers and other team members are aware of service-based milestones and can acknowledge them within the recognition platform’s social feed.
- 5) Support Awards Programs – The system will also need to enable employee awards programs where participation is limited to specific segments of our workforce. This includes the ability to solicit awards nominations.
- 6) Ongoing Campaign Support – In addition to providing a platform to enable the key capabilities noted above, the successful vendor will also be able to provide ongoing support, insights and resources that support the long-term sustainment of our new recognition program.

1.4.5 Expected Outcomes and Results

The recognition platform should achieve the following key objectives:

- Make it easy for employees to provide peer-to-peer recognition through an intuitive and accessible platform.
- Allow employees to redeem points from an online catalogue from a variety of reward options that are meaningful to them.
- Enable acknowledgement of service-based milestones in a meaningful way
- Automate recognition program processes and reduce as keep manual administrative tasks to a minimum.

- enable management of existing employer awards programs.
- Offer Robust reporting and analytics that will provide insights into participation that empower HR and managers with actionable data.
- Enable long-term sustainment of the recognition program.
- have a positive impact on engagement, inclusion and our organizational culture.

1.4.6 Service Location

BCI employs more than 700 people across our global operations, with 95% of our workforce based in Canada. The recognition platform will be used by all employees at all office locations and the successful Proponent will provide support remotely. BCI has employees in the following locations:

- Victoria, BC, Canada (~680 employees)
- Vancouver, BC, Canada (~85 employees)
- New York City, NY, USA (~30 employees)
- London, UK (~10 employees)
- Mumbai, India (2 employees)

1.5 SCOPE OF WORK

The successful Proponent is expected to provide a commercial off the shelf (COTS) recognition platform solution, and the support required to effectively launch and sustain a points-based peer-to-peer Recognition Program. Proponents may suggest additional or value-added services based on their expertise.

1.5.1 Assessment & Design

BCI is seeking an existing purpose-built solution that can be customized to meet our needs. The successful Proponent will:

- Engage in consultation and leverage best practices to provide insights, ideas, and creative solutions to enable our objectives.
- Partner with BCI stakeholders to customize the platform to reflect the elements and desired outcomes of our Recognition Program
- Provide guidance to BCI team on customization options and enable their decision-making by leveraging extensive experience and expertise as a recognition-platform provider.

1.5.2 Development & Implementation

- The successful Proponent is expected to provide the necessary project management resources to manage the implementation of the platform at BCI.
- The successful Proponent must clearly identify a primary contact person with the ability to resolve and escalate issues if required during the implementation period/project.

- A clearly defined project plan is required to ensure all deliverables are met by mutually agreed upon dates.
- The successful Proponent will make available technical resources to partner with BCI technical resources to ensure that all technology requirements are completed.
- In addition to implementation of the platform solution, the successful Proponent will also partner with and support BCI resources in the development of a communications launch plan and a plan to support program sustainment over time.

1.5.3 Maintenance or Service Agreement

- Ongoing technical assistance should be included as part of the service agreement.
- Program support should be available post-implementation (i.e., campaigns, best practices).

1.5.4 Licensing

- Licensing costs should be clearly identified in the pricing details.

1.5.5 Training & Adoption

- The successful Proponent will supply existing training materials and resources that can be customized for BCI as required.
- Administrator training must be provided to BCI team members who will have platform administration roles to ensure they fully understand how to use, customize and maintain the system.
- Reference documents and administration materials are required for administrators.
- Throughout the implementation project, the successful Proponent is expected to actively facilitate knowledge transfer to BCI resources.
- End-User Training – training and/or easy-to use materials are necessary to ensure that employees, as end users, fully understand how to use the platform.
- Manager Training – To support managers in leveraging functionality such as reporting tools, manager-specific training and/or resources will be needed for this stakeholder group.
- Resource materials that support user adoption and ongoing engagement will be provided

1.5.6 Optional Services

- Ability to provide “printed to order” BCI branded products / merchandise as part of rewards catalogue is desirable.
- Ability for the platform to facilitate automated connections between employees based on specific attributes to support mentoring, networking, onboarding or Employee Resource Groups (ERGs).

1.5.7 Out of scope

- Use of the platform to conduct any form of survey is outside the scope of what the platform will be used for

- Workday is used as our Human Resource Information System (HRIS). The recognition platform is not intended to replace any of Workday's functionality, including operating as our performance management system.

1.5.8 Value Adds

Proponents are asked to clearly explain additional value adds that are included in the pricing provided without incurring any additional costs or can be purchased as optional services. Discounts will also be considered as a value add.

1.6 RESPONSIBILITIES

The anticipated high-level responsibilities of BCI and the vendor are outlined below:

1.6.1 Responsibilities of BCI resources:

- Clarify and provide pertinent information/documentation required for the project.
- Provide two HR/business resources to participate in project implementation as part of a project team for a combined average of up to 20 hours/week during implementation period.
- Identify and provide internal IT resources required for integration and internal IT testing.
- Provide approvals of/sign off on deliverables.
- Internal communications with employees / end-users.

1.6.2 Responsibilities of vendor resources:

- Clearly outlining in their proposal, a fulsome description of project resource requirements and responsibilities.
- Develop a mutually agreeable project plan.
- Project management of vendor resources.
- Deliver all in-scope services and deliverables.
- Adhere to project timelines agreed upon within the contract.

1.7 PROJECT TIMELINE

It is expected that the recognition platform will go-live and be rolled out to the organization by February 28, 2025.

1.8 OTHER OPPORTUNITIES

BCI reserves the right to negotiate additional related services with the successful Proponent based on other requirements that may arise. Alternatively, BCI may obtain competitive proposals for additional related services. If BCI seeks competitive proposals, the successful Proponent to this RFP may be eligible to submit a proposal for these future opportunities.

1.9 SERVICE LEVEL AND DATA REQUIREMENTS

The Proponent will meet the service level and data requirements for the proposed solution as outlined below:

- **Solution Online Availability.** Make the proposed Solution available continuously for 99.9% of BCI's use except for agreed scheduled maintenance and other exceptions that are agreed upon between the Preferred Proponent and BCI; and
- **Problem Resolution Response Time.** BCI expects the proposed solution to offer a timely response with a standard issue resolution matrix, including options such as a service line, service email, self-serve web portal, or dedicated client representative.

Ongoing technical support should be available across all time zones, ensuring global support for all BCI locations. Support requests must be triaged and assigned to engineers who will collaborate with BCI or involve development team engineers for resolution as needed.

An on-call escalation process that follows the sun model should be accessible Monday to Friday to enhance support and promptly resolve any issues that may arise.

- **Disaster recovery and business continuity.** The Preferred Proponent will maintain and implement disaster recovery and avoidance procedures to ensure that the software is not interrupted during any disaster. The Preferred Proponent will provide BCI with information on its current disaster recovery and business continuity plan and all updates, upon request. All requirements of this RFP, including those relating to security, personnel due diligence, training, backup, and testing shall apply to the Preferred Proponent's disaster recovery site.

1.10 DATA REQUIREMENTS

The Preferred Proponent will be expected to meet BCI's data security requirements as outlined in its Security Schedule, which will be attached as a schedule to the Contract. BCI will share a copy of the Contract, including the Data & Security Schedule, with Proponents after receiving a completed Proposal Notification Form (**Appendix A**) by the deadline indicated in the Schedule Section.

1.11 CONFIDENTIALITY AND PRIVACY

- **Confidentiality and Privacy:** The Preferred Proponent will be expected to meet BCI's personal information privacy requirements as outlined in its Privacy Schedule, which will be attached as a schedule to the Contract. In addition to market standard confidentiality obligations, this will require the Preferred Proponent to agree to with all applicable privacy legislation, including the British Columbia *Freedom of Information and Privacy Protection Act* (FIPPA) and the UK's *General Data Protection Regulation* (GDPR), as applicable. This ensures adherence to both regional and international privacy regulations, safeguarding the privacy and security of user data. BCI will share a copy of the Contract, including the Privacy Schedule, with Proponents after receiving a completed Proposal Notification Form (**Appendix A**) by the deadline indicated in the schedule section.

2 RFP Process Rules

2.1 ACCEPTANCE OF TERMS AND CONDITIONS

Submitting a Proposal indicates acceptance of all of the terms and conditions set out in this RFP, including those that follow and are included in all appendices and any Addenda.

A Proposal must be signed by a person authorized to sign on behalf of the Proponent with the intent to bind the Proponent to the RFP and to the statements and representations in the Proponent's Proposal.

2.2 SUBMISSION OF PROPOSALS

- a) Proposals must be submitted before the Closing Time using the submission method(s) set out on the cover pages of this RFP. The Proponent is solely responsible for ensuring that BCI receives a complete Proposal, including all attachments or enclosures, before the Closing Time.
- b) The following applies for all Proposals submitted by email:
 - i. The subject line of the email and any attachment should be clearly marked with the name of the Proponent, the RFP number and the project or program title.
 - ii. The maximum size of each attachment must be 15 MB or less (Proponents are solely responsible for ensuring email Proposal submissions comply with any size restrictions imposed by the Proponent's internet service provider);
 - iii. Proponents should submit their email Proposal in a single email and avoid sending multiple email submissions for the same opportunity. If the file size of an electronic submission exceeds the applicable maximum size, the Proponent may make multiple submissions (using multiple emails for the same opportunity) to reduce attachment file size to be within the maximum applicable size. Proponents should identify the order and number of emails making up the email Proposal submission (e.g., write email 1 of 3, email 2 of 3, email 3 of 3 in the subject bar);
 - iv. For email Proposal submissions sent through multiple emails, BCI reserves the right to seek clarification or reject the Proposal if BCI is unable to determine what documents constitute the complete Proposal; and
 - v. BCI does not accept ".zip" or ".exe" files. BCI may reject Proposals that are compressed, cannot be opened or contain viruses, malware or corrupted attachments.
- c) BCI strongly encourages Proponents to submit Proposals with sufficient time to complete the upload and transmission of the complete Proposal and any attachments before the Closing Time. The Proponent bears all risk associated with delivering their Proposal by electronic submission, including, but not limited to, delays in transmission between the Proponent's computer and BCI's electronic mail system.

- d) The Proponent acknowledges that email transmissions are inherently unreliable. If BCI's electronic mail system rejects an email Proposal submission for any reason, the Proponent may not be permitted to resubmit their Proposal after the Closing Time. The Proponent is strongly advised to contact BCI's Contact Person immediately to arrange for an alternative submission method if:
- i. the Proponent's email Proposal submission is rejected by BCI's electronic mail system, or
 - ii. the Proponent does not receive an automated response email from BCI confirming receipt of the email and all attachments within a half hour of the time the email Proposal submission was sent by the Proponent.
- h) An alternate submission method may be made available, at BCI's discretion, and it is the Proponent's sole responsibility for ensuring that a complete Proposal submitted using an approved alternate submission method is received by BCI before the Closing Time. BCI makes no guarantee that an alternative submission method will be available or that the method available will ensure a Proponent's Proposal is received before the Closing Time.

2.3 MODIFICATION OF TERMS

BCI reserves the right to modify the terms of this RFP at any time. This includes the right to cancel this RFP at any time prior to entering into a Contract with the Preferred Proponent.

2.4 CHANGES TO THIS RFP AND ADDITIONAL INFORMATION

Any changes to this RFP will be made through Addenda and posted on BC bid. It is the sole responsibility of the Proponent to check for Addenda and to keep their contact information up to date.

2.5 ENQUIRIES

BCI will make every effort to respond to all written enquiries received before the enquiries deadline indicated in the schedule section. All enquiries related to this RFP are to be addressed to the BCI Contact Person identified on the cover pages of this RFP and are to reference the RFP number and title in the subject line of the email. Responses will be made through Addenda posted on BC bid. Information from any other source is not official and should not be relied upon.

BCI will respond to enquiries that it considers relevant to this RFP, which BCI will determine in its sole discretion. BCI may choose, in its sole discretion, not to respond, to respond in portion or in whole, or to reformulate enquiries received, in whole or in part, prior to providing a response. BCI may require Proponents to sign a confidentiality agreement before being provided with copies of responses.

If any Proponent contacts any person within BCI, other than the BCI Contact Person regarding any matter in connection with this RFP, BCI may, in its sole discretion, disqualify that Proponent from participating in the RFP process and reject that Proponent's Proposal without further consideration.

2.6 LATE PROPOSALS

Proposals will be marked with their receipt time through the Closing Location. **Only Proposals received before the Closing Time will be considered to have been received on time. Late Proposals will not be considered.** In the event of a dispute, the receipt time as recorded at the Closing Location will prevail.

2.7 PROPOSAL VALIDITY

Proposals will be open for acceptance for a **minimum of 180 days** after the Closing Time.

2.8 CURRENCY AND TAXES

Prices quoted are to be in Canadian dollars and exclusive of all applicable taxes. They are to be inclusive of duty, Free On-Board (FOB) destination, and delivery charges where applicable.

2.9 FIRM PRICING

Prices will be firm for the entire Contract period unless this RFP specifically states otherwise. Inflation will only be considered in contract extensions and not included in original term.

COMPLETENESS OF PROPOSAL

By submitting a Proposal, the Proponent warrants that if the 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 additional charge.

2.10 CHANGES TO PROPOSALS

By submitting a clear and detailed written notice, the Proponent may amend or withdraw their Proposal prior to the Closing Time. Unless the RFP provides otherwise, Proponents should use a consistent submission method for submitting Proposals and any amendments or withdrawals. At the Closing Time, all Proposals become irrevocable. The Proponent will not change the wording of the Proposal after the Closing Time, and no words or comments will be added to the Proposal unless requested by BCI for the purposes of clarification.

2.11 CONFLICT OF INTEREST

A Proponent may be disqualified if the Proponent's, or a proposed subcontractor's, current or past interests may give rise to an actual or potential conflict of interest in connection with the products or services described in this RFP. This includes, but is not limited to, involvement by a Proponent in the preparation of the RFP or a relationship with any employee, contractor, or BCI representative involved in preparation of the RFP, participating on the evaluation committee, or in the administration of the Contract. If a Proponent is in doubt as to whether there might be a conflict of interest, the Proponent

should consult with the BCI Contact Person prior to submitting a Proposal. By submitting a Proposal, the Proponent represents that it is not aware of any circumstances that would give rise to a conflict of interest that is actual or potential, in respect of this RFP for which it has not advised the BCI Contact Person.

2.12 NO LOBBYING

A Proponent must not attempt to influence the outcome of the RFP process by engaging in lobbying activities. Any attempt by the Proponent to communicate for this purpose directly or indirectly with any employee, contractor, client, or representative of BCI, including members of the evaluation committee, or with the media, may result in disqualification of the Proponent.

2.13 SUBCONTRACTING

- a) Unless the RFP states otherwise, BCI will accept Proposals where more than one organization or individual is proposed to deliver the services described in this RFP, so long as the Proposal identifies the lead entity that will be the Proponent and that will have sole responsibility to deliver the services under the Contract. BCI will enter into a Contract with the Proponent only. The evaluation of the Proponent will include evaluation of the Resources and experience of proposed sub-contractors, if applicable.
- b) All subcontractors, including affiliates of the Proponent, should be clearly identified in the Proposal.
- c) Where applicable, the names of approved subcontractors listed in the Proposal will be included in the Contract. No additional subcontractors will be added, or other changes made to this list in the Contract without BCI's written consent.

2.14 EVALUATION

Proposals will be assessed in accordance with the evaluation criteria set out in this RFP. BCI will be under no obligation to receive further information, whether written or oral, from any Proponent. BCI is under no obligation to perform any investigations or to otherwise verify any statements or representations made in a Proposal.

2.15 INSURANCE REQUIREMENTS

The Preferred Proponent will be required to maintain, at their own expense, the following minimum insurance coverage for the term of the Contract:

- a) **Commercial General Liability** with limits **no less than \$2,000,000 inclusive per occurrence** against bodily injury, personal injury and property damage, which policy will include contractual liability coverage insuring the activities of Service Provider under this Agreement.

- b) **Professional Errors and Omissions Liability** Insuring Service Provider's liability resulting from errors or omissions in the performance of the Services in an amount per occurrence, and in the aggregate, calculated as follows:
 - i. **not less than \$1,000,000**, if the fees for Services are anticipated to be *less than \$500,000*; and
 - ii. **not less than \$2,000,000**, if the fees for Services are anticipated to be *\$500,000 or greater*.
- c) Cyber Liability Insurance, including comprehensive cyber liability (third party) and expense (first party) coverage, with limits no less than \$2,000,000 per occurrence.
- d) Insurance for their property on a replacement cost basis.
- e) The Preferred Proponent shall provide a copy of such insurance in a form reasonably acceptable to BCI evidencing the insurance required to be maintained by the Preferred Proponent. All insurance maintained by the Preferred Proponent shall be primary and shall not call into contribution any insurance maintained by BCI.

2.16 WORKERS' COMPENSATION COVERAGE

Prior to the commencement of any Services by the Preferred Proponent, and throughout the term of the contracts, the Preferred Proponent is required to have in place valid workers' compensation coverage in accordance with the terms of the *Workers' Compensation Act*, or its applicable equivalent in the jurisdiction(s) in which the Preferred Proponent operates. Unless a Proponent is exempt and can provide evidence of exemption to the satisfaction of BCI, coverage is mandatory, and proof of such coverage will be provided by the Preferred Proponent upon BCI's request.

2.17 CONTRACT

- a) By submitting a Proposal, the Proponent agrees that should its Proposal be Preferred, it will enter into a Contract with BCI that will include terms and conditions that reflect the requirements of BCI as set out in this RFP, are consistent with industry standards for services of the type described in this RFP and that are, in any event, satisfactory to BCI as reflected on BCI's standard form services Contract. Among other things, the Preferred Proponent will be expected to comply with BCI's Privacy and Data Security Schedules attached to the Contract. A copy of the template Contract will be provided to Proponents following receipt of a Proponent's completed Proposal Notification Form and prior to the RFP Closing Time identified in Section 3.1 of this RFP.
- b) Written notice to a Proponent that they have been conditionally identified as the Preferred Proponent and the subsequent full execution of a Contract will constitute the award for the provision of the goods or services, and no Proponent will acquire any legal or equitable rights or privileges relative to the goods or services until the occurrence of both such events.

2.18 CONTRACT FINALIZATION DELAY

If a written Contract cannot be finalized with provisions satisfactory to BCI within 30 days of notification of the Preferred Proponent, BCI may, at its sole discretion at any time thereafter, terminate discussions with that Proponent and either commence finalization of a Contract with the next highest-scoring Proponent or choose to terminate the RFP process and not enter into a Contract with any of the Proponents

2.19 DEBRIEFING

At the conclusion of the RFP process, all Proponents will be notified. Proponents may request a debriefing with BCI.

2.20 PROPONENTS' EXPENSES

Proponents are solely responsible for their own expenses in preparing a Proposal, attending meetings, and for any subsequent Contract negotiations with BCI. If a Proposal is rejected, Proponents acknowledge and agree that BCI will not be liable for any claims, whether for costs of damages incurred by the Proponent in preparing the Proposal, loss of anticipated profit in connection with any final Contract, or any other matter related to this RFP whatsoever.

2.21 LIMITATION OF DAMAGES

Further to the preceding paragraph, the Proponent, by submitting a Proposal, agrees that they 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 their Proposal, and the Proponent, by submitting a Proposal, waives any claim for any damages incurred or potential damages, including loss of profits if no Contract is made with the Proponent.

2.22 LIABILITY FOR ERRORS

While BCI 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 BCI, nor is it necessarily comprehensive or exhaustive. Nothing in this RFP is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in this RFP.

2.23 NO COMMITMENT TO AWARD

The RFP should not be construed as an agreement to purchase goods or services. The lowest priced, or any Proposal, will not necessarily be accepted. The RFP does not commit BCI in any way to award a Contract.

2.24 REQUIRED LICENSES

If the Preferred Proponent cannot obtain a required approval, permit or license then any award or Contract signed shall be considered void.

2.25 LEGAL ENTITIES

BCI reserves the right in its sole discretion to:

- a) Disqualify a Proposal if BCI is not satisfied that the Proponent is clearly identified;
- b) Prior to entering into a Contract with a Proponent, request that the Proponent provide confirmation of the Proponent's legal status and certification in a form satisfactory to BCI that the Proponent has the power and capacity to enter into the Contract;
- c) Not enter into a Contract with a Proponent if the Proponent cannot satisfy BCI that it is the same legal entity that submitted the Proponent's Proposal; and
- d) Require security screenings for a Proponent's subcontractors and key personnel before entering into a Contract and decline to enter into a Contract with a Proponent, or to approve subcontractors or key personnel, that fail to pass the security screenings to BCI's satisfaction.

2.26 RESERVATION OF RIGHTS

In addition to any other reservation of rights set out in the RFP, BCI reserves the right, in its sole discretion, to:

- a) Modify the terms of the RFP at any time prior to the Closing Time, and to cancel the RFP at any time prior to entering into a Contract with a Proponent;
- b) In accordance with the terms of this RFP, accept the Proposal or Proposals that BCI deems most advantageous to itself;
- c) Request clarification from a Proponent with respect to its Proposal, including clarifications as to provisions in its Proposal that are conditional or that may be inconsistent with the terms of this RFP, without any obligation to make such a request to all Proponents (or to any Proponent), and consider such clarifications in evaluating the Proposal;
- d) Waive a defect, irregularity, non-conformity or non-compliance in or with respect to a Proposal or failure to comply with the requirements of this RFP (other than the mandatory criteria described in Section 4.2), and accept a Proposal even if such a defect, irregularity, non-conformity or non-compliance or failure to comply with the requirements of this RFP would otherwise render the Proposal null and void;
- e) Even where the RFP contemplates otherwise, enter into Contracts with more than one Proponent with respect to the services or products described in the RFP;

- f) Accept or reject or disqualify any or all Proposals or cancel this RFP at any time;
- g) Extend any date, time, period or deadline provided in this RFP;
- h) Re-advertise for new or additional Proposals;
- i) Elicit offers from other parties (whether or not such parties have responded to this RFP) or engage in another RFP or other procurement;
- j) Enter into a contract with persons who have not responded to this RFP;
- k) Terminate negotiations with any Proponent;
- l) Choose any Proposal without regard to price; and
- m) Obtain products or services through separate competitive process(es), through direct awards or to continue or extend existing contractual arrangements.

2.27 OWNERSHIP OF PROPOSALS; CONFIDENTIAL INFORMATION

All Proposals submitted by, or on behalf of, a Proponent become the property of BCI. They will be received and held in confidence by BCI, subject to the provisions of the FIPPA and this RFP. Information obtained by the Proponent as a result of participation in this RFP, including BCI's information or information about a third party, is confidential and may be used only by the Proponent in preparation of their Proposal.

Proponents should clearly indicate in their Proposal any information or elements of the Proposal that should be considered confidential and could harm the Proponent's competitive interests if released.

Proponents should clearly indicate in their Proposal any information or elements of the Proposal that are patented, trademarked, copyrighted, or otherwise proprietary to the Proponent. Please enclose proof of such proprietary nature where possible (e.g. certificate(s) of registered trademark(s)).

These confidentiality obligations are applicable to this RFP. Once a Preferred Proponent is selected, other confidentiality obligations may be negotiated in the Contract for the acquisition of the goods or services or both.

2.28 COPYRIGHT

This document is subject to copyright and may only be used, reproduced, modified and distributed to the extent necessary for the Proponent to prepare and submit a Proposal. No Proponent may use the name of BCI or any of BCI's other logos, designs, colors or registered trademarks and names used, owned or registered by BCI or its affiliates except with prior written approval of BCI.

2.29 CONFIDENTIALITY AGREEMENT

The Proponent acknowledges that prior to the Closing Time they may be required to enter into a confidentiality agreement with BCI in order to obtain access to confidential materials relevant to preparing a Proposal.

2.30 ALTERNATE SOLUTIONS

If more than one approach to deliver the services described in the RFP is offered, Proponents should submit the alternative approach in a separate Proposal.

2.31 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 subcontractors. If the RFP requires Proponents to provide BCI with personal information of employees who have been included as Resources in response to the RFP, Proponents will ensure that they have obtained written consent from each of those employees before forwarding such personal information to BCI. Such written consents should specify that the personal information may be forwarded to BCI for the purposes of responding to the RFP and used by BCI for the purposes set out in this RFP. BCI may, at any time, request the original consents or copies of the original consents from Proponents, and upon such request being made, Proponents will immediately supply such originals or copies to BCI.

2.32 GOVERNING LAW

This RFP shall be governed by the laws of the Province of British Columbia, and the laws of Canada applicable therein, and the parties hereby irrevocably attorns and submits to the exclusive jurisdiction of the courts of the Province of British Columbia.

2.33 NEWS RELEASES

The Proponent shall not issue any news release in any form of media, including on the Proponent's website, pertaining to the RFP or any ensuing Contract without the express written approval from BCI.

2.34 FORCED LABOUR

BCI is subject to the Forced Labour Law. By submitting a Proposal, the Proponent represents and warrants that it has taken, or that it will take, reasonable measures to prevent or reduce the risk that Forced Labour practices exist in its operations or supply chains. At a minimum, Proponent represents and warrants that it has instituted and maintains (or is in the process of instituting) reasonable practices designed to prevent or reduce the risk of Forced Labour in its supply of goods and the performance of its services under the scope of this RFP. BCI may request additional information regarding the measures Proponents have taken to comply with this section.

3 RFP Schedule and other Information

3.1 SCHEDULE

The following table outlines the anticipated schedule for this RFP. All times shown are in PST. All steps and dates are subject to change at BCI's sole discretion.

Event	Date
Appendix A deadline	September 30, 2024
Enquiries deadline	September 30, 2024
RFP Closing Time	October 7, 2024 at 2:00 PM PST.
Short-listed Proponents advised by	October 18, 2024
Presentation/Interview/Demonstration	October 25 – 28, 2024.
Deep Dive	November 8, 2024
Reference checks, if required	November 11-15, 2024
Preferred Proponent conditionally selected by	November 20, 2024
Contract finalized by	January 15, 2025

3.2 PROPONENTS' PACKAGE

N/A

4 Evaluation Process

The evaluation of Proposals will be conducted by a team consisting of employees or contractors of BCI. All members of the team will be bound by standards of confidentiality. Proponents should ensure that they provide the information requested for all criteria to receive full consideration during evaluation.

Proponents acknowledge that BCI may determine at any stage and in its sole discretion that a Proponent does not have the appropriate qualifications or experience to perform the scope of services, or that the fees or prices proposed by the Proponent do not provide sufficient value to necessitate further consideration of the Proposal or to award the Contract to the Proponent.

4.1 EVALUATION PROCESS AND METHODOLOGY

The Preferred Proponent will be the Proponent scoring the most points after evaluation. The evaluation process will consist of the following stages:

- Stage one – Mandatory Criteria
- Stage two – Proposal Assessment
- Stage three – Presentation/Demonstration (short-listed Proponents only)
- Stage four – Deep Dive (preferred Proponent only)
- Stage five – Reference Checks (preferred Proponent only)

Proposals will be evaluated against the weighted criteria identified in the table below. Further details regarding the evaluation of the Proposal assessment and financial response portions are provided under Appendices.

Evaluation Criteria	
Mandatory Requirements	Pass/Fail
Proposal Assessment (Shortlist)	Based on Scoring Criteria
Presentation/Demonstration	Based on Scoring Criteria
Deep Dive	Pass/Fail
References	Pass/Fail

Following initial evaluation for Stage 2, the highest scoring Proponents will be shortlisted. Shortlisted Proponents will be required to participate in a presentation/demonstration with their proposed team members prior to final scoring and selection of the successful Proponent. After the presentation/demonstration, the selected Proponent's scoring during stage 2 might be adjusted to reflect the evaluation team's findings during stage three.

4.2 STAGE ONE – MANDATORY CRITERIA

Proposals not clearly demonstrating the following mandatory criteria will be excluded from further consideration during the evaluation.

Item #	Mandatory Criteria
1.	Proposals must be received at the Closing Location before the Closing Time as per cover pages
2.	Proposals must be submitted using the submission method set out on the cover pages of this RFP and in accordance with Schedule Section.
3.	Completed and signed Proponent Declaration Letter, Appendix C , must be included
4.	Proposal must be submitted in English
Demonstrated Mandatory Requirements (Included in Appendix D)	
5.	Proponent must acknowledge that it has instituted and maintains, or is in the process of instituting, reasonable practices designed to prevent or reduce the risk that Forced Labour will be used at any stage in the supply of goods or the performance of its services under the scope of this RFP or the Contract. BCI reserves the right at any time to request details from Proponents to demonstrate its compliance with this requirement.
6.	Platform must integrate to Workday
7.	Vendor must confirm platform covers all mandatory requirements from Appendix H – Business Requirements.
8.	Vendor must confirm platform covers all mandatory requirements from Appendix I – Technology Mandatories.

4.3 STAGE TWO – PROPOSAL ASSESSMENT

The evaluation team will assess each Proponent’s ability to fulfill the scope of work and responsibilities identified in Section 1 according to the criteria listed below. Where minimum scores are indicated, Proposals that do not meet the minimum scores for any criteria will receive no further consideration. Proponents meeting the minimum score for all desirable criteria will be ranked based on overall score, and up to the top three (3) Proponents may be short-listed to participate in the third stage. BCI reserved the right to include additional proponents if deemed necessary.

The proposal assessment will score is as follows:

Item #	Proposal Assessment Criteria	Allocated Percentage
1.	Corporate Profile (See Appendix D)	5
2.	Proponent Qualifications and Experience (See Appendix E)	5
3.	Project Approach and Methodology, Work Plan and Training Options (See Appendix F)	20
4.	Pricing (Appendix G)	15
5.	Business Functional Requirements (See Appendix H)	25
6.	Technology Questionnaire (See Appendix I – Two separate files)	20
7.	Service level and agreements (Appendix K)	10
	Total	100

4.4 STAGE THREE – PRESENTATION/INTERVIEW/DEMONSTRATION

Up to three (3) short-listed Proponents will be invited to attend a presentation/interview/demonstration in person or virtually with the evaluation team in Victoria, B.C. The Proponents' proposed lead Resource(s) should attend and lead the presentation to provide insight and assurance to BCI on the proposed Solution's ability to meet/exceed the functional and non-functional requirements. During this stage, the evaluation team may clarify or verify statements made in the written Proposal, or during any demonstration, if applicable; however, this stage is not an opportunity for a Proponent to change or revise its Proposal.

Item #	Presentation/Interview Criteria	Points
1.	Suitability of the lead Resource(s), including the ability to handle situations, communicate effectively, assign appropriate Resources, relationship skills and overall suitability of the proponent's team	10
2.	Project Approach and Methodology, Work Plan and Training Options (See Appendix F)	35
3.	Technology Service Desk Contact Center – IT questionnaire (See Appendix I)	20
4.	Functional Requirements (Appendix H) - Case Scenario Demonstration – to be defined later.	35
	Total	100

After the presentation/demonstration, the selected Proponent's scoring during stage 2 might be adjusted to reflect the evaluation team's findings during stage three.

4.5 STAGE FOUR – DEEP DIVE

One (1) Proponent will be selected to attend virtual deep dive sessions with members of BCI's Business and Technology team to provide further insight on specific items of interest to the evaluation team. The agenda for these sessions will be sent in advance of the meeting.

4.6 STAGE FIVE – REFERENCE CHECKS

The references of the Preferred Proponent or, if the Preferred Proponent is disqualified, the next highest qualified Proponent, may be contacted to validate any part of their Proposal. Although they are not given a score, BCI will not enter into a Contract with any Proponent whose references are found to be unsatisfactory.

Proponents are asked to include the names and contact information of at least three references with their Proposals. If a Proponent does not include references in its Proposal, BCI may ask for such references at any time during the evaluation of Proposals. Failure to provide the requested references,

either in the Proposal or if and as requested by BCI, may result in the Preferred Proponent failing the reference check.

It is the responsibility of the Proponent to ensure that they have obtained permission from the reference to be contacted by BCI. As a courtesy, before contacting the references supplied by the Preferred Proponent, or any other references, BCI will inform the Preferred Proponent of their intention to do so. In addition, BCI reserves the right, in its sole discretion, to contact and use references that are not named in the Proponent's Proposal as it deems necessary to clarify, test or verify the information contained in the Proposal and confirm the suitability of the Preferred Proponent.

4.7 AWARD NOTIFICATION AND DEBRIEFING

At the conclusion of the RFP process, all Proponents will be notified. Unsuccessful Proponents may request a post award debriefing which will be made available after the Contract has been executed. Proponents acknowledge and agree that certain details of the Contract award (including the name of the Preferred Proponent and the Contract's approximate value) may be disclosed and made publicly available and that BCI does not require the consent of the Preferred Proponent to do so.

Appendix A

PROPOSAL NOTIFICATION FORM

RFP Title : **Employee Recognition Platform**
RFP Number : **BCI-RFP-2024-09-16**

Interested parties are requested to return this Proposal Notification form as an indication of their intent to respond. Please return this form before or by end of day on September 30, 2024 to:

Attention: Raul Caballero, Senior Analyst, Strategic Sourcing
British Columbia Investment Management Corporation
Email: procurement@BCI.ca

Company Name: _____
Street Address: _____
City/Province: _____ Postal Code: _____
Mailing Address: _____

Phone Number: _____ Fax Number: _____
Contact Person: _____
E-Mail: _____

Further correspondence about this RFP should be sent by email to the contact person listed above.

Signature: _____ Date: _____
Print name: _____ Title: _____

Appendix B

PROPONENT PROPOSAL GUIDE

Using the stated criteria in Section 4, the evaluation team will assess each Proponent's ability to fulfill the scope of work and responsibilities identified under Section 1. Proponents should ensure that they provide all information requested in this guide in order to receive full consideration during evaluation.

Proposals should be submitted following a format and layout similar to the following table.

Title	Contents
Cover Page	RFP number and title Proponent's name Closing day and time
Table of Contents	Include page numbers
Proponent Declaration Letter	Appendix C
Corporate Profile and Demonstrated Mandatory Requirements (Maximum 3 Pages)	Appendix D
Proponent Qualifications and Experience (Maximum 5 Pages)	Appendix E
Project Approach & Methodology, Workplan and Training Options	Appendix F
Pricing (submitted as separate document)	Appendix G
Business Functional Requirements (submitted as separate document)	Appendix H
Technology Questionnaire & Technology Mandatories (See Appendix I – Two separate files)	Appendix I
Service Level and Agreements	Appendix K

Appendix C

PROPONENT DECLARATION LETTER

Letterhead or proponent's name and address

Date

British Columbia Investment Management Corporation
750 Pandora Avenue
Victoria, BC V8W 0E4

Attention: Raul Caballero, Senior Analyst, Strategic Sourcing

Subject: BCI-RFP-2024-09-16 - Employee Recognition Platform

The enclosed Proposal is submitted in response to the above-referenced RFP, including all amendments. We have carefully read and examined the RFP and have conducted such other investigations as were prudent and reasonable in preparing the Proposal. We agree to be bound by statements and representations made in our Proposal.

By submission of our Proposal, we agree to all of the terms and conditions of the RFP, and we confirm that we meet all mandatory criteria as listed under Section 4.2 of the RFP, Stage One – Mandatory Criteria.

Yours truly,

Signature _____

Signatory's name:

Title:

Telephone number:

Email address:

Legal name of proponent:

Doing business as name:
(if applicable)

Note to proponents: A person authorized to sign on behalf of the Proponent to bind the Proponent to statements made in response to this RFP must complete and sign this declaration letter. Modifications to this letter, other than the addition of the requested information, may disqualify the Proponent. Any questions and/or concerns about this letter are to be submitted to the BCI Contact Person identified in the cover page.

Appendix D

CORPORATE PROFILE AND MANDATORY REQUIREMENTS

The evaluation team will assess the Proponent's corporate capability to provide the requested services and demonstrate a proven track record of delivering similar solutions/services to large corporations with offices in different jurisdictions, preferably in the financial services and investment sector. In particular, the evaluation team will be considering the Proponent's company background, capacity, and experience in providing the services described in this RFP. Preference will be given to Proponents who demonstrate corporate stability. Consideration will also be given to the number of professional staff working in direct and relevant service delivery roles, and their client base for similar requirements.

Where Proponents are submitting a Proposal with one or more business partners, this same information should be provided for each business partner and, if applicable, provide an organization structure for the Proponent team. See Section 1.5 and Section 1.6 for an overview of BCI's scope and requirements.

Proposals should include a brief (maximum 2 pages) company profile as background and context for their capability to provide the services described in this RFP. And one (1) page for Mandatory requirements (total of 3 pages for Appendix D).

Using a format similar to the tables below, the company profile should include:

Appendix D – Demonstrated Mandatory Requirements
Acknowledge that it has instituted and maintains, or is in the process of instituting, reasonable practices designed to prevent or reduce the risk that Forced Labour will be used at any stage in the supply of goods or the performance of its services under the scope of this RFP or the Contract. BCI reserves the right at any time to request details from Proponents to demonstrate its compliance with this requirement.
Platform must integrate to Workday
Vendor must confirm platform features all mandatory requirements from Appendix H – Business Requirements.
Vendor must confirm platform features all mandatory requirements from Appendix I – Technology Mandatories.

Appendix D – Corporate Profile
A. A brief company background including information about the number, size, geographic and industry diversity of the Proponent’s clients.
B. Number of years delivering services described in this RFP in a similar environment
C. Year and jurisdiction of incorporation, parent company (if applicable), and address of the head office and local office (if applicable).
D. Ability to provide appropriate resources, either employees or subcontractors, to perform services described in this RFP.
E. A description of how the Proponent proposes to resolve issues. Preference will be given to conflict resolution processes that have a workable escalation process for both sides and a relationship matrix in place.
F. A description of how the Proponent manages resource substitutions.
G. A description of how the Proponent will manage relationships with subsidiaries and partners.
H. How are data and analytics used to assess the value of a recognition and rewards program, and how it demonstrates benefits positively impacting our business?

Appendix E

PROPONENT QUALIFICATIONS AND EXPERIENCE

For this criterion, the evaluation team will be considering the Proponents' qualifications to provide the requested services. Preference will be given to Proponents with more relevant and experienced resources.

Proposals should include:

- The proposed team that will be performing the work and, if more than one resource, their role on the project team (provide in a format similar to the table below)
- Resumes of key resources proposed for this engagement (provide in an Appendix)
- Three (3) similar project references. Preference will be given to those Proponents with financial services and/or investment management corporation experience (provide in a format similar to the table below).
- The named Lead Resource (Account Manager), including the following: the number of accounts that the Manager is responsible for, types of accounts, and how BCI's account compares in size and scope to the Account Manager's other clientele. Preference will be given to Proponents with one single point of contact.
- This section is limited to a max of 5 pages.

Please follow a format similar to the ones below for a) and d) above:

Proposed Team			
	Member 1	Member 2	Member 3
Role:			
Qualifications:			
Related experience:			
Additional Information:			

*Add members as required

Project Reference 1	
Team members	
Client name:	
Location:	
Scope of work:	

Head office		Budget:	
Contact Information:	Name - Position	Phone	Email
Start Date		End Date:	
Additional details:			

Project Reference 2			
Team members			
Client name:			
Location:			
Scope of work:			
Head office		Budget:	
Contact Information:	Name - Position	Phone	Email
Start Date		End Date:	
Additional details:			

Project Reference 3			
Team members			
Client name:			
Location:			
Scope of work:			
Head office		Budget:	
Contact Information:	Name - Position	Phone	Email
Start Date		End Date:	
Additional details:			

Appendix F

PROJECT APPROACH AND METHODOLOGY, WORK PLAN AND TRAINING OPTIONS

Project Approach and Methodology

For this criterion, the evaluation team will be considering the Proponent's approach and methodology for accomplishing the defined scope of work, inclusive of the input required from BCI. Consideration will be given to the suitability of the approach and methodology, and any value-added services being proposed. The evaluation team will also consider each Proponent's proposed deliverables and the suitability of these deliverables for this project's requirements.

Proponents should include the following:

- a) A clear description of the methodology they will use to complete the deliverables for this project.
- b) A description of how they will complete the required list of deliverables with client acceptance criteria.
- c) An explanation as to why their proposed approach and methodology is best suited for the defined scope of work.
- d) Details of the approach and methodology, including other value-added services, as determined by the Proponent.
- e) Major risks associated with their proposed solution (for each risk, identify those activities that can be undertaken to reduce, mitigate or eliminate the risk).
- f) Identify the associated responsibilities that the Proponent will assume and those expected of BCI. Ensure that these activities are reflected in their work plan.
- g) Other value-added services, as determined by the Proponent.
- h) Detailed information on meeting Deliverables

Work Plan

In assessing the work plan, the evaluation team will consider the reasonableness and completeness of the work plan to ensure a go-live no later than February 28, 2024. Preference will be given to Proponents who submit work plans that are specific, measurable, attainable, realistic, and timely. Proponents are to:

- 1. Provide a work plan that clearly outlines and describes:
 - a) All tasks to be completed during the project.
 - b) Key milestones.
 - c) Deliverables.

- d) Start and finish dates.
 - e) How much input is required by the proposed resources.
 - f) How much input is required by BCI's resources.
 - g) Identifies which resources (contractor and BCI) will be required for which deliverables.
 - h) Overall approach for quality management and the related work products delivered.
 - i) Provide details on how your team will ensure to meet the project timeline requirement by February 28, 2025.
2. Identify major risks they see associated with this project and how their Proposal addresses the risks. For each risk describe:
 - a) Activities that can be undertaken to reduce, mitigate or eliminate the risk; and
 - b) Associated responsibilities and ensure that these activities are reflected in their work plan.
3. Provide a list of proposed project resources, an organization structure for the project team, inclusive of the assigned individual's name, that clearly identifies the reporting structure within the team and to the BCI, including the individuals providing support and/or quality assurance.
4. A description on how the Proponent proposes to resolve issues. Preference will be given to conflict resolution processes that have a workable escalation process for both sides and have a relationship matrix in place.

Training & Adoption

- Conduct training sessions for administrators to ensure they understand how to use the new platform. Provide comprehensive reference materials for administrators, i.e., electronic user guide/manual.
- Provide training and/or resources for platform end-users, specific to both managers and employees.
- Promote adoption of the platform through change management strategies, including ongoing communication and resource materials to support sustainment of the recognition program.

Additional Services

Provide a summary of additional services and software scalability options (1 page maximum).

Appendix G

PRICING

To ensure the price criterion does not influence the assessment of the other desirable criteria, Proponents are to submit their pricing in a separate attachment (Appendix G - Pricing - BCI-RFP-2024-09-16 - Employee Recognition Platform).

BCI may request clarity during stage two or stage three to ensure that the pricing considerations are confined to a similar and comparable scope between Proponents.

Formula approach

The Respondent with the lowest price will be awarded the maximum score. Scores for other Respondents will be awarded based on the percentage that their price exceeds the lowest bid price. Price will be evaluated in a comparative fashion. To compare Respondent proposals, the lowest qualified Responded price will receive full points for pricing and all other responses will be compared against that amount using the following formula:

$$\text{Points Awarded} = (\text{Lowest Price} / \text{Proposed Price}) * \text{Maximum Points Available}$$

Proponents are to provide their pricing and note clearly the assumptions made in establishing the pricing.

Appendix H

BUSINESS FUNCTIONAL REQUIREMENTS

Instructions for using the Requirements Response Template

Proponents must complete Business Functional Requirements (Appendix H), attached as a separate file.

'Requirements have been designated as "Mandatory" (Must-have) "Highly Valued" (Should-have), or "Desirable" (Could-have). Non-compliance with a "Mandatory" will eliminate the proponent from the process.

Mandatory: Requirements that **must** be implemented for the solution to be considered successful.

Highly Valued: Requirements that are high priority and **should** be included in the solution if possible.

Desirable: Requirements that are desirable but not necessary and **could** be included if possible.

Scored requirements included in this Requirements Response Template are based on weightings identified in the RFP Evaluation Criteria and will be scored accordingly by the Evaluation team.

All Proponents are required to respond to the entire RFP to the best of their ability. Requirements are answered with the drop-down menu options provided:

- Fully Supported
- Partially Supported
- Not Supported
- Yes, with Configuration
- Yes, with Customization
- Yes, with Add-on

It is recommended that you put in additional comments in the Description of How Proponent Meets the Requirement column to provide context to the response. A description is mandatory to explain "Yes, with Configuration", "Yes, with Customization", and "Yes, with Add-on" responses.

We define **Configuration** as any effort that requires slight alterations to functionality inherent in the proposed out-of-box solution (that do not involve coding) to meet our demands.

We define **Customization** as any effort beyond configuration that requires significant alteration to functionality inherent in the proposed out-of-box solution (i.e., code changes) to meet our needs.

We define **Add-on** as an additional piece of software that is integrated into the proposed out-of-box solution (i.e., third-party/partner software) to meet our needs. If add-ons will be part of the proposed solution, the Proponent must clearly explain how the add-on product integrates with the core offering and how long the integration/partnership will function in the Description section of the Requirements Response Template (.xlsx). Additionally, the cost of any additional piece of software must be identified as part of the pricing response in Appendix G.

Appendix I

TECHNOLOGY QUESTIONNAIRE

Proponents are required to complete the attached Appendix I - Technology Questionnaire and Appendix I - Technology Mandatory Requirements (2 separate files). Please provide as much detail as possible in your responses, including comments for additional context.

Proponents must also include details on how their platform cover the mandatory requirements, mandatories must be meet in order to be eligible for the process.

Appendix J

SAMPLE CONTRACT

For this engagement, BCI may require the Successful Proponent to sign a BCI's General Services Agreement (GSA). By responding to this RFP, Proponents acknowledge their intent is to sign the BCI GSA. BCI will share a copy of its GSA template, after appendix A closing date, with Proponents via email after receiving a completed Proposal Notification Form (Appendix A).

Appendix K

SERVICE LEVEL AND AGREEMENTS

Proponents are to describe their service level and product management strategy. The following should be included:

1. How Proponents will meet the service level and data requirements in the scope of work.
2. A help desk model, including process flows for bug fixes, service requests, incidents, etc., escalation for issue severity.
3. Disaster recovery options.
4. A list of Service Level Agreements (SLAs) for service requests, incidents, problems, etc., and how they are defined should be included.
5. A description of the average update schedule and confirmation of the maintenance requirement of users.
6. Provide a roadmap based on future demand, detailing how the increase in demand will be met over the next five (5) years.
7. A planned roadmap for future product enhancements and upgrades and explain how that product roadmap is created.
8. A list of historical planned and unplanned releases: minor, major, by year – over the last 3-5 years. Include an estimate of the related downtime to implement each release.
9. A description of the support and service levels as proposed and included in the budget. For example, gold-level service, which includes 24/7 emergency support, unlimited server reboots, 2 restores, backup management, advanced monitoring, etc.
10. A description of how the cloud agreement (if required) to be provided by the Preferred Proponent will be mutual and protect both BCI and its interests.
11. A description of how the Proponent will ensure all-inclusive maintenance and support of the proposed Solution at no further cost to BCI.
12. Provide details on any scheduled major and minor releases for the next 12 months?
13. What is the planned down time for upgrades or enhancement releases?
14. What has the software uptime been for the past 3 years?

Appendix L

TECHNICAL DEEP DIVE

Following stage three of the evaluation process (Presentation/Demonstration), shortlisted Proponents may be invited to attend a virtual technical deep dive with members of BCI's Technology team to provide further insight on technology-related responses provided in Appendix I. An agenda will be sent to Proponents one (1) week before the call.

Although this stage is not given a score, BCI will not enter into a Contract with any Proponent that does not meet BCI's security requirements.