

City of Coquitlam
Request for Information and Qualification
RFIQ No. 25-049

Financial System Modernization

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[SUBMISSION FORM](#)

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KEY DATES

RFIQ Issue Date	Friday, April 25, 2025
Deadline for Questions Send questions to: bid@coquitlam.ca referencing the RFIQ name and number	2:00 PM (local time) Tuesday, May 13, 2025
Deadline for Issuing Addenda	Wednesday, May 14, 2025
Submission Deadline	2:00 PM (local time) Friday, May 16, 2025

2 RFIQ REQUIREMENTS, GUIDELINES, AND TERMS & CONDITIONS

All applicable requirements and guidelines for this RFIQ, are available on the City’s website [here](#).

To be eligible for the award, the City may require only the **successful Respondent** to have the following in place *before* providing any Goods or Services. The requirements that may apply to this RFIQ, listed in order of precedence are:

- a) Instructions to Proponents

These items are not required as part of this RFIQ Submission but will be required prior to entering into an agreement with the City for Services with the successful Respondent.

3 DEFINITIONS

In this RFIQ the following terms will have the meaning set out below:

“Agreement” “Contract” means a formal written contract between the City and a Consulting firm selected to undertake Services.

“City” means the City of Coquitlam.

“Consultant(s)” mean those firms that the City has selected to provide professional and technical consulting services relating to planning & design of projects and/or project categories identified in this RFIQ.

“Preferred Respondent” means a Respondent selected by the Evaluation Committee to participate in a subsequent RFP process or enter into negotiations for a Contract.

“Respondent” “Proponent” means an entity that submits a response to this RFIQ.

“RFIQ” means this Request for Information and Qualifications.

“Services” “Solution” means and includes anything and everything required to be done by the Consultant for the fulfillment and completion of the Contract as described in this RFIQ.

“Submission” means a response submitted for evaluation in response to this RFIQ.

4 INSTRUCTIONS TO RESPONDENTS

4.1 Acknowledgement

The City acknowledges with gratitude and respect that the name Coquitlam was derived from the hə́ŋqəmiḥə́m (HUN-kuh-MEE-num) word kʷikwə́ləm (kwee-KWET-lum) meaning “Red Fish Up the River”. The City is honoured to be located on the kʷikwə́ləm traditional and ancestral lands, including those parts that were historically shared with the qícéý (kat-zee), and other Coast Salish Peoples.

4.2 Purpose

The purpose of this RFIQ is to invite submissions from professional, qualified, and experienced firms and invite the highest ranked firms to participate in a second stage Request For Proposals (RFP) process to identify a Consultant for the City’s **Financial System Modernization** project.

5 SELECTION PROCESS

5.1 Process

This RFIQ is the first stage of a potential two-stage process.

Stage 1: - Request for Information and Qualifications

It is the intent of the City to utilize this RFIQ to invite qualified respondents who are interested in, and who have the expertise, experience, resources and knowledge to perform the Services as described in this RFIQ.

The City will review the Submissions and rank them based on the evaluation criteria outlined in this RFIQ. The City may, at its discretion, interview one or more Respondents, or request clarifications or additional information from a Respondent with respect to any Submission.

The evaluation of the Submissions will be based solely on the contents of the Submissions, reference checks, Respondent presentations, the City’s past experience with the Respondent, and any clarifications provided in writing in response to the questions asked by the City. The City reserves the right to directly negotiate with one or more Respondents during Stage 1.

Based on the evaluation results, the City will create a shortlist of Preferred Respondents to be invited to Stage 2 – Request for Proposals.

Stage 2: - Request for Proposals

The Preferred Respondents shortlisted in Stage 1 may be invited to participate in Stage 2, an invite-only Request for Proposals (RFP), where detailed information and financial pricing will be requested. All interested parties should recognize that participation in this RFIQ does not guarantee an invitation to Stage 2 or that an RFP will be issued. Evaluations will be confidential, and no totals or scores will be released. The City also reserves the right, at its sole discretion, to cancel this process at any time and for any reason.

5.2 Evaluation Criteria

a) Instructions for submission and attachment referencing

The City uses Microsoft Word to streamline the transfer of Respondent information into an evaluation document. Responses on the Submission Form should provide direct answers or concise summaries of any referenced attachments. Where attachments are necessary, each response should summarize the relevant information and clearly indicate where the City can find the corresponding details within the attachments, specifying precisely, for example, "see Section X, subsection Y, paragraph Z, on page N."

b) Submission Format and Content Authenticity

Lower scores may be assigned if Submission Forms:

I. Non-conforming

- Are not submitted in Microsoft Word format.
- Rely solely on references such as "see section X in the attached document" without providing summaries.

II. Authenticity and AI Generated Content

- The City preference is for Submissions to be original and directly aligned with the requirements outlined in this RFIQ. Submissions containing boilerplate, non-specific, or AI-generated content may receive a lower score.
- Respondents must demonstrate a clear understanding of the City's needs by providing detailed, tailored responses, including methodologies. Submissions lacking sufficient detail and originality may result in a lower evaluation score.

c) Evaluation Criteria and Points Allocation

Each submission will be evaluated based on the following criteria:

i. **Solution Evaluation**

Criteria	Points
Corporate Background – Solution	10
Proposed Solution	40
Support Services	20
Financial	30
Subtotal	100
Solution Demonstration*	30
Total	130

Corporate Background – Solution

- Corporate accountability.
- Corporate background, including the structure and the reseller relationship with the proposed Solution.

Proposed Solution

- Core and auxiliary modules available to meet our high-priority use cases and nice-to-have requirements.
- System architecture and integration capabilities.
- Product roadmap.
- Proposed integration approach to existing City solutions.
- Data migration and management.
- Scalability and performance.
- Customization and configuration.
- Implementation and deployment timelines.

Support Services

- Training support and resources available for end users.
- Self-serve resources provided for administrators and users.
- Warranty, including duration and the scope of coverage (e.g., software bugs, security vulnerabilities, etc.).
- Appendix A – Security Support Requirements

Financial and Value Add

- One-time software acquisition fees and ongoing annual licensing requirements.
- Software license structure, annual pricing increases, and available discounts.

ii. Implementation Partner Evaluation

Criteria	Points
Corporate Background – Implementation Partner	10
Approach and Methodology	40
Support Services	20
Financial	30
Subtotal	100
Implementation Partner Interview*	20
Total	120

**Solution Demonstration and Implementation Partner Interviews will be limited to shortlisted Respondents*

Corporate Background – Implementation Partner

- Corporate accountability.
- Respondents understanding of our objectives and requirements.
- Capabilities, capacity, and resources.

- Hiring and retention strategies.
- Suitability, roles, and references.

Approach & Methodology

- Approach and methodology to implementing the proposed solution, including how the team would recommend the City address the need for customization or development.
- City resource requirements and involvement.
- Experience of the Respondent in delivering similar mandates, including how they have overcome challenges or obstacles on similar projects.
- Approach to quality assurance and training activities.

Support Services

- Proposed support services and approach during implementation, at go live, and once transitioned to ongoing maintenance and support.
- Warranty including duration and scope of coverage (e.g., defects in workmanship, performance issues, etc.)
- Appendix A – Security Support Requirements

Financial and Value Add

- Proposed team structure, rates, and full-time equivalent (FTE) for the duration of the project.

iii. Evaluation and Shortlisting Process

The rated criteria will be used to determine best overall value to the City. Submissions will be evaluated and the top Respondents may be shortlisted and invited to participate in an evaluated Solution Demonstration and an evaluated Implementation Partner Interview. The total score will be used to determine the best value to the City.

The Software Solution demonstrations will be approximately 2.5 hours in length and will be conducted in-person or via video conference on Microsoft Teams or another online conferencing solution at the sole discretion of the City. Detailed demonstration cases will be provided to short-listed Respondents in advance of the demonstration date.

iv. Demonstrations

Each demonstration case will be evaluated on the following:

<i>Demonstration Criteria</i>	<i>Max points available</i>
Functionality	10 points
Ease of Use	10 points
Technical	5 points
Integrations	5 points

The Software Solution Demonstration will be live (and not pre-recorded) and will not use static images.

The Implementation Partner Interview will be approximately 2.5 hours in length and be conducted via video conference on Microsoft Teams or another online conferencing solution at the sole discretion of the City.

v. Implementation

Each Implementation Partner interview will be evaluated on the following:

<i>Interview Criteria</i>	<i>Max points available</i>
Project Implementation Plan	10 points
Proposed Project Team	10 points

- d) These criteria will be used to determine best overall value to the City. Submissions will be compared to select one or more that are most advantageous.

- e) Additional Evaluation Considerations

These criteria will be used to determine best overall value to the City as well as any other criteria that may become evident during the evaluation process.

The City may, at its discretion, request clarification or additional information from a Respondent with respect to any Submission and the City may make such requests to only selected Respondents. The City may consider such clarifications or additional information in evaluating a Submission.

- f) Submission Compliance and Rejection

Incomplete Submissions or Submissions submitted on forms other than the Submission Form may be rejected.

The City reserves the right to reject without further consideration any Submission which in its opinion does not meet the criteria it considers essential for the Services outlined in this RFIQ.

Where only one Submission is received, the City may reject such and re-issue the RFIQ on a selected basis.

- g) Disclosure of Information

Respondents agree the City may disclose names of Respondents and total award amount, however, unevaluated results, unit prices, rates or scores will not be provided to any Respondents.

5.3 Selection

The City will review the Submissions and rank them based on the evaluation criteria outlined above. The City reserves the right to compare Submissions to other Submissions and

consider other criteria that may become evident during the evaluation process to obtain best value.

The City makes no representation of any kind as to the volume of projects and reserves the right to implement a separate pre-qualification process where more specialized services or projects are involved.

The evaluation will be confidential and no totals or scores will be released to any of the Respondents.

Where only one Proposal is received, the City may reject such and re-issue the RFIQ on a selected basis.

6 SCOPE OF WORK

6.1 General

This Scope of Work aims to modernize the City's financial systems to enhance operational efficiency, data accuracy, and reporting capabilities while ensuring security and regulatory compliance.

a) Assessment and Analysis

- Conduct a comprehensive review of the City's existing financial systems, processes, and workflows.
- Identify gaps, inefficiencies, and areas for improvement, including integration challenges with other City systems.
- Validate and augment existing requirements from stakeholders to ensure the new system meets operational needs, compliance standards, and reporting requirements.

b) System Design and Planning

- Develop a detailed system design and implementation plan, including data migration strategy, system architecture, and integration with existing City systems
- Ensure the proposed solution is scalable, secure, and compliant with all British Columbia FOIPPA legislation,
- Respondents are advised that the second stage RFP will include security requirements and related questions to assess the proposed solution's ability to meet the City's security and privacy standards.

c) Data Migration and Integration

- Perform data cleansing, validation, and migration from current systems to the new platform.

d) Implementation and Deployment

- Install, configure, and deploy the new financial system, ensuring minimal disruption to City operations.
- Conduct rigorous system testing, including user acceptance testing (UAT), performance testing, and security testing.

e) Training and Change Management

- Provide comprehensive training for City staff, including end-users and system administrators.
- Develop user guides, training manuals, and conduct workshops to facilitate a smooth transition.
- Implement change management strategies to support adoption and minimize resistance.

f) Support and Maintenance

- Provide ongoing technical support, system maintenance, and updates to ensure optimal system performance and security.

Attached in **Appendix A – Security Support Requirements** is a set of security, reliability, performance, maintainability, and usability requirements that must be addressed as part of the Respondent's submission.

6.2 Current System

The existing system has been in use for over 30 years and no longer meets the evolving needs of the city's financial operations. The City implemented its core Financial Management System (FMS), Oracle EBS, in 1993. It has been maintained periodically to version 12.2.11 (the latest software version available is 12.2.13).

Since implementing the FMS, the City has acquired and integrated additional applications to support financial management and reporting processes in procurement, Tangible Capital Asset (TCA) management, budget planning, revenue management, and annual financial statements reporting. Over time, this has created key personnel risk and extended the City's Information and Communications Technology team (ICT) to maintain the ecosystem, components of which are falling out of vendor support. This has resulted in cumbersome reporting processes, fragmented data, a collection of workarounds inside and outside of systems, and reduced productivity.

6.3 Objectives of the System Replacement

The City aims to replace the existing FMS and processes with a cloud Software-as-a-Service (SaaS) solution, creating integrations with other technology solutions. With a general goal of consolidating financial systems, additional modules or capabilities may be absorbed into the FMS, reducing the complexity of the financial ecosystem at the City and removing key personnel and integration risks. More specifically, the objectives for the FMS replacement project include:

- Increased timeliness and access to data / information;
- Modernized user experience and associated processes;
- Increased use of out-of-the-box capabilities to reduce customizations;
- Streamlined and simplified integrations with other systems, especially IBM Maximo;
- Addressed governance and controls risks;
- Reduced integration and key personnel risks;
- Improved process efficiency;

- Reduced business continuity risk of technology obsolescence; and
- Simplified maintenance and support of the FMS and financial technology ecosystem.

6.4 Scope Overview

The City is looking for a solution and implementation team that can be tailored for municipal operations, including the following:

- Design, configuration, and implementation of a new financial records management solution.
- Integrations to other finance and accounting solutions.
- Data migration from Oracle EBS.
- User training.
- Ongoing technical support.

It is anticipated that the majority of the City's requirements and use cases will be met by the core finance modules offered by most alternatives. According to the Respondents expertise, knowledge of the proposed solution, and understanding of the City's needs, should a different set of modules be better aligned with the City's objectives, the Respondent shall include, as part of their proposal, their recommended full list, accompanied with a detailed rationale for inclusion. The final suggested list of modules should be accounted for in the Respondents estimates for pricing, timeline, etc. As of writing, the contemplated modules include:

- Core Finance
 - Financials & General Ledger
 - Accounts Receivable
 - Accounts Payable
 - Fund Accounting
 - Cash Management, including Interfund Cash Balancing
 - Inventory
 - Projects Costing
 - Trimester Reporting (Budget, Actual, Forecast)
- Operating and Capital Budget Planning (multi-year)
 - Operating budgets
 - Labour budgets, including burden
 - Fund Accounting
 - Fleet budgets
 - Capital budgets
- Procurement and Accounts Payable Processing (Procure to Pay)

The City is further interested in any components or modules that enable system and user workflows and improve data management. The City expects that best practices and process automation will be leveraged by the Respondent during this implementation. This would include ensuring that online workflow approvals, process scheduling, and data synchronization are optimally utilized. The suggested implementation approach should limit

customizations to an absolute minimum, and ensure the solution is kept to out-of-the-box and leverage available configurations to ensure forward compatibility.

6.5 Integration with Third-Party Systems

In addition to the core financial modules above, the City utilizes other technologies that leverages common data, much of it which will reside within the financial system of record. The successful Respondent would be responsible for working with ICT and other system vendors to configure the required integrations. These include:

- **PeopleSoft Payroll:** A payroll journal entry is created for Oracle EBS which will need to be recreated with the new system until such a time that a new payroll provider is implemented.
- **Kofax MarkView Accounts Payable System:** Depending on the City's desire to replace MarkView, this integration may be permanently retained. Data from MarkView AP will inform payables in the new financial system, some of which may require payment by cheque through AssurePay.
- **AssurePay Cheque Printing:** The payments module of the financial system will need to be able to push information for cheques. Cheques will continue to be required for accounts payable and payroll purposes.
- **IBM Maximo:** The financial system will need to push the chart of accounts, invoices, and supplier information, and ingest purchase order information and GL journal entries for inventory.
- **Revenue Systems:** Tempest, AMANDA, E-xact Online Transactions, and Xplor Recreation (formerly PerfectMind) integrations to ingest revenue journal entries and payment receipts.
- **IBM Cognos:** Financial system data must be provided to the business intelligence system.

6.6 User Training

The successful Respondent will be expected to propose and implement a comprehensive training program for the new financial system. The Respondent should outline their recommended training method, which could include, but is not limited to, a super user model, a train-the-trainer approach, or direct vendor-led training sessions.

The proposal should detail how the Respondent plans to:

- Identify and train key users or super users, if applicable.
- Ensure effective dissemination of knowledge throughout the City.
- Provide detailed training materials, hands-on workshops, and ongoing support.
- Accommodate different learning preferences and schedules through various training delivery methods (e.g., in-person sessions, live online webinars, self-paced e-learning modules).

- Offer comprehensive user manuals, quick reference guides, and access to a dedicated support team to address any questions or issues during and after the training period.

The Respondent's proposal will be evaluated based on its ability to effectively train all system users and ensure a smooth transition to the new financial system.

6.7 Ongoing Support Services

The successful Respondent will be expected to propose and implement a comprehensive support structure to ensure all client needs are met efficiently and effectively. The Respondent should outline their recommended support tiers and services, which could include, but are not limited to:

- **Tier 1 Support:** Basic support services including troubleshooting, user assistance, and initial problem resolution. This tier should be available via email, online chat, and telephone during standard business hours.
- **Tier 2 Support:** Advanced support for more complex issues that cannot be resolved by Tier 1. This includes in-depth technical support, system diagnostics, and issue escalation. Tier 2 support should be available 24/7 to address critical issues promptly.
- **Tier 3 Support:** Expert-level support for the most complex and critical issues, including system failures and major disruptions. This tier should involve senior technical experts and may include on-site support if necessary.

The proposal should also detail how the Respondent plans to:

- Provide regular system updates, maintenance services, and performance monitoring to ensure the system's ongoing reliability and efficiency.
- Include a detailed Service Level Agreement (SLA) outlining response times, resolution times, performance metrics, and an escalation process to guarantee the quality of support services provided.

The Respondent's proposal will be evaluated based on its ability to provide effective and reliable support services for the new financial system.

6.8 Other Services

The Respondent is to provide a list of additional services, not stated in this RFIQ, that may be of interest to the City.



City of Coquitlam

SUBMISSION FORM

RFIQ No. 25-049

Financial System Modernization

Submissions will be received as per date and time in **Key Dates Section**

Submissions must not exceed a maximum of 60 pages.

INSTRUCTIONS FOR SUBMISSION

Submissions are to be returned in Microsoft Word and any other supporting documents to be consolidated into one PDF file and uploaded through QFile, the City's file transfer service accessed at website: qfile.coquitlam.ca/bid

1. In the "Subject Field" enter: RFIQ Number and Name
2. Add files and "Send Files"

(Ensure your web browser remains open until you receive 2 emails from QFile to confirm upload is complete.)

Respondents are responsible to allow ample time to complete the Submission process. If assistance is required phone 604-927-3037.

Legal Name of Company	
Contact Person and Title	
Business Address	
Telephone	
Email Address	

Confirm Appendix A – Security Support Requirements is attached	
<input type="checkbox"/> Yes	<input type="checkbox"/> No

SOLUTION PROVIDER SUBMISSION FORM

1. CORPORATE

a) Corporate Accountability - If the response to any of the questions below is YES, on a separate page provide a complete explanation. Include all details including project name, location, names of all parties involved and relevant dates, etc.

I.	Has your firm been terminated on any contract prior to completing a contract or has any officer, partner or principal of your firm been an officer, partner or principal of another firm that was terminated or failed to complete a contract, in the last five years?	
II.	Has a payment or performance bond been invoked against your current firm, or has any officer, principal or individual with a financial interest in your current firm been an officer, principal or individual with a financial interest in another firm that had a payment or performance bond invoked, in the last five years?	
III.	Has your firm, within the last five years, filed any lawsuits or requested arbitration with regard to contracts?	
IV.	Are there any judicial proceedings (other than criminal proceedings) pending or concluded (in the last five years) against your firm or a principal or officer or anyone with a financial interest in your firm relating to the procurement or performance of any construction contract including but not limited to actions to obtain payment brought by subcontractors, suppliers or others?	
V.	Have any judicial or administrative proceedings been brought or concluded (in the last five years), adversely against your firm or a principal or officer or anyone with a financial interest in your firm relating to a violation of any municipal, provincial or federal law regulating hours of labour, unemployment compensation, minimum wages, overtime pay, WorkSafeBC, labour relations, occupational health or safety?	

b) Corporate Background - Respondents to provide information on the following (use the spaces provided and/or attach additional pages, if necessary):

i. Structure of the Solution Vendor, background, number of employees, how many years they have been in business and organizational history (e.g. mission, vision, corporate directions, years in business, etc.):

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ii. Relationship with resellers or implementation partners through design, configuration, and post-go-live.

2. **SOLUTION PROVIDER PROPOSED SOLUTION**

a) Deployment – The Respondent is to provide a detailed description of how the Software Solution can be deployed and scaled across the City, including which modules will be deployed based on the information provided in this RFIQ. Include in this description any modules that are required to meet the Use Cases described in Section 6.4 of the RFIQ to meet the following high-priority capabilities:

- Core Finance & Reporting Capabilities
- Budget Planning & Trimester Reporting Lifecycle
- Procure-to-Pay & Accounts Payable Processing

b) Auxiliary Deployment / Modules – The Respondent is to provide a detailed description of additional modules that would benefit the City. These modules may complement the core deployment, which may include (but not be limited to):

- Secure Cheque Printing
- Business Intelligence & Reporting
- Payroll Management & Processing
- Human Capital Management

c) System Architecture and Integration - What is the system architecture of the proposed solution (e.g., cloud-based, on-premises, or hybrid) and how does the system integrate with existing City applications?

d) Product Roadmap – The Respondent is to provide a concise overview describing the product and its technology roadmap, which may include the next major releases and any significant function or architectural enhances that are planning in the next year and the plan for the next up to 5 years.

e) Integrations – The Respondent is to provide a description of the integration capabilities of the proposed solution, including the preferred method for data transfer. At writing, this could include (but is not limited to) integrating with the following finance systems:

- PeopleSoft Payroll
- Kofax MarkView Accounts Payable System*
- AssurePay Cheque Printing*
- IBM Maximo
- IBM Cognos
- Various Revenue Systems (AMANDA, Tempest, e-Xact, Xplor (formerly PerfectMind))

*Note that solutions which include modules for Accounts Payable or Cheque Printing should still address integration requirements in the event the City is not interested in pursuing a replacement solution at this time.

f) Data Migration and Management - What is your approach to data migration from legacy systems, including data cleansing and validation? How does the solution ensure data integrity and accuracy during the migration process?

g) Scalability and Performance - Is the system scalable to accommodate the City's future growth and increasing data volumes? What is the maximum number of concurrent users the system can support without performance degradation?

h) Customization and Configuration - To what extent can the system be customized to meet the City's unique financial processes and reporting needs?

i) Implementation and Deployment Timelines - What is the typical implementation timeline for a project of this scope?

3. SOLUTION PROVIDER SUPPORT SERVICES

a) Training and Support - What training programs and support resources are available for end-users and system administrators?
b) Self-Serve Resources - Describe the available resources provided for administrators and users as included with the proposed solution and licensing. These could include (but not be limited to) in-app help, online tutorials, self-serve resources, user forums, etc.
c) Warranty - Describe the warranty provided for the software solution. Include details on the duration of the warranty, the scope of coverage (e.g., software bugs, security vulnerabilities), and any conditions or limitations that apply. Additionally, specify the process for claiming warranty support, including how updates and patches are handled and the expected response time for resolving issues.

4. SOLUTION PROVIDER FINANCIAL

Prices shall be all-inclusive and stated in (Canadian Funds). Prices shall remain FIRM for the completion of the Services. Respondents may add or remove rows as necessary to reflect the proposed modules. For pricing purposes, Respondents can assume the City will procure 100 standard user licenses, 10 administrator (or equivalent) licenses, and two report writer / developer licenses. If licenses are concurrent / seats assume 25 licenses.

Category	Year	Cost (CAD)
One-time costs for the acquisition of the Software Solution	Year 1	\$
One-time costs for integrating with existing City systems	Year 1	\$
[Core Deployment Module 1]	Year 1	\$
[Core Deployment Module 1]	Year 2	\$
[Core Deployment Module 1]	Year 3	\$
[Core Deployment Module 1]	Year 4	\$
[Core Deployment Module 1]	Year 5	\$
[Core Deployment Module 2]	Year 1	\$
[Core Deployment Module 2]	Year 2	\$
[Core Deployment Module 2]	Year 3	\$
[Core Deployment Module 2]	Year 4	\$
[Core Deployment Module 2]	Year 5	\$

[Auxiliary Deployment Module 1]	Year 1	\$
[Auxiliary Deployment Module 1]	Year 2	\$
[Auxiliary Deployment Module 1]	Year 3	\$
[Auxiliary Deployment Module 1]	Year 4	\$
[Auxiliary Deployment Module 1]	Year 5	\$
[Auxiliary Deployment Module 2]	Year 1	\$
[Auxiliary Deployment Module 2]	Year 2	\$
[Auxiliary Deployment Module 2]	Year 3	\$
[Auxiliary Deployment Module 2]	Year 4	\$
[Auxiliary Deployment Module 2]	Year 5	\$
Training Costs	Year 1	\$
Training Costs	Year 2	\$
Training Costs	Year 3	\$
Training Costs	Year 4	\$
Training Costs	Year 5	\$
Maintenance and Support Costs	Year 1	\$
Maintenance and Support Costs	Year 2	\$
Maintenance and Support Costs	Year 3	\$
Maintenance and Support Costs	Year 4	\$
Maintenance and Support Costs	Year 5	\$

b) Software License Structure – Are licenses provisioned by module, by named user, by concurrent user (seats), by transaction, or otherwise? Describe how costs are calculated.

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c) Annual Pricing – Describe how prices are set in subsequent years (e.g., fixed-price, fixed or variable annual increases, etc.). What is the expected annual increase after year five?

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d) Available Discounts – Describe any pricing discounts offered to the City based on length of contract term, number of users, or otherwise.

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IMPLEMENTATION PARTNER SUBMISSION FORM

5. CORPORATE

a) Corporate Accountability - If the response to any of the questions below is YES, on a separate page provide a complete explanation. Include all details including project name, location, names of all parties involved and relevant dates, etc.

I.	Has your firm been terminated on any contract prior to completing a contract or has any officer, partner or principal of your firm been an officer, partner or principal of another firm that was terminated or failed to complete a contract, in the last five years?	
II.	Has a payment or performance bond been invoked against your current firm, or has any officer, principal or individual with a financial interest in your current firm been an officer, principal or individual with a financial interest in another firm that had a payment or performance bond invoked, in the last five years?	
III.	Has your firm, within the last five years, filed any lawsuits or requested arbitration with regard to contracts?	
IV.	Are there any judicial proceedings (other than criminal proceedings) pending or concluded (in the last five years) against your firm or a principal or officer or anyone with a financial interest in your firm relating to the procurement or performance of any construction contract including but not limited to actions to obtain payment brought by subcontractors, suppliers or others?	
V.	Have any judicial or administrative proceedings been brought or concluded (in the last five years), adversely against your firm or a principal or officer or anyone with a financial interest in your firm relating to a violation of any municipal, provincial or federal law regulating hours of labour, unemployment compensation, minimum wages, overtime pay, WorkSafeBC, labour relations, occupational health or safety?	

b) Provide a detailed narrative as to the Respondent's understanding of the project objectives, outcomes and vision, identifying major issues and opportunities presented in this RFIQ:

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c) Capabilities, Capacity and Resources - Respondents to provide information on the following (use the spaces provided and/or attach additional pages, if necessary):
i. Structure of the Respondent, background, how many years they have been in business and organizational history (e.g. mission, vision, corporate directions, years in business, etc.):
ii. Respondent is to state relevant experience and qualifications as to the Services requested in the RFIQ:
iii. Respondent is to state any value added benefits and activities they can provide in delivering the Services. This can include, but isn't limited to, additional services at no charge, environmental responsibility, hiring practices, local procurement, and reconciliation with indigenous peoples. Provide details:
iv. Respondent is to describe their capabilities, resources and capacities, as relevant to the Services requested in the RFIQ. This includes their capacity to take on this project in regards to other work the Respondent may have ongoing:

d) Hiring Practices - Respondent to describe their process for screening and hiring their staff, including required certifications.
e) Retention Strategies - A brief description of staff retention strategies and how it plans to mitigate staff turnover during the course of the implementation.
f) Suitability - A brief narrative explaining why and how the Respondent's team is best suited for the Project.

g) Roles – A brief description of the role each team member will play on the project.

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h) References – Respondent shall be competent and capable of performing the Services requested and successfully delivered service contracts of similar size, scope and complexity. The City reserves the right to contact any person(s), agency(ies) or firm(s) not listed as part of an independent review (use the spaces provided and/or attach additional

Reference No. 1	
Description of Contract	
Size and Scope	
Work Performed	
Start Date	
End Date	
Contract Value	
Project completed on budget	
Project completed on schedule	
Reference Information	Company
	Name:
	Phone Number:
	Email Address:
Reference No. 2	
Description of Contract	
Size and Scope	
Work Performed	
Start Date	
End Date	
Contract Value	
Project completed on budget	
Project completed on schedule	
Reference Information	Company
	Name:
	Phone Number:
	Email Address:
Reference No. 3	
Description of Contract	
Size and Scope	
Work Performed	
Start Date	
End Date	

Contract Value	
Project completed on budget	
Project completed on schedule	
Reference Information	Company
	Name:
	Phone Number:
	Email Address:

6. IMPLEMENTATION PARTNER APPROACH & METHODOLOGY

a) Approach - Respondent is to state how their organization will approach the Project and engage with the City to deliver the Services.
b) Methodology - Proposed methodology the Respondent would utilize to deliver the Services, including phasing and release methods.
c) Customizations - Describe the approach to considering and implementing system / solution customizations.
d) City Resources - What time, resources, or support (e.g., staff, documentation) will be required from the City to ensure the successful completion of the Services? What staff resources or ownership will be required from the City in steady-state?
e) Experience - The Respondent is to describe their experience supporting Finance System or Enterprise Resource Planning implementations, upgrades, releases and other functionality additions.
f) Challenges - Describe the anticipated challenges and how the Respondent typically prepares for and mitigates these.

g) Quality Assurance – Provide the measures the Respondent would include to maintain quality control for the Services being performed.

h) Training – The Respondent is to describe the preferred approach to user training.

7. IMPLEMENTATION PARTNER SUPPORT SERVICES

a) Implementation Support Services – The Respondent is to describe the support provided during design, configuration, and testing.

b) Go Live Support Services – The Respondent is to describe support provided at cutover / during Go Live.

c) Ongoing Maintenance & Support Services – The Respondent is to describe their ongoing maintenance and support offering and proposed Service Level Agreements.

8. IMPLEMENTATION PARTNER FINANCIAL

Prices shall be all-inclusive and stated in (Canadian Funds). Prices shall remain FIRM for the completion of the Services The Respondent can add or remove rows to match proposed resourcing and approach.

Role/Category	Hourly Rate (CAD)	Project Commitment (FTE)
Project Manager	\$	
Solutions Architect	\$	
Business Analyst	\$	
Functional Consultant	\$	
Data Migration Specialist	\$	
Quality Assurance (QA) Tester	\$	
Change Management and Training Consultant	\$	
Integrations Specialist	\$	

Attention Purchasing Manager:

1. **I/We, the undersigned duly authorized representative of the Respondent**, having received and carefully reviewed all of the Submission documents, including the RFIQ and any issued addenda posted on the City’s website www.coquitlam.ca/Bid-Opportunities, and having fully informed ourselves as to the intent, difficulties, facilities and local conditions connected to performing the Services; submit this Submission in response to the RFIQ.
2. **I/We** agree to the rules of participation outlined in the **Instructions to Respondents**.
3. **I/We acknowledge** receipt of the following Addenda related to this Request for Information and Qualification and have incorporated the information received in preparing this Submission.

Addendum No.	Date Issued

This Submission is submitted this ____ day of _____, 20____.

I/We have the authority to sign on behalf of the Respondent and have duly read all documents.

Legal Name of Company	
Signature(s) of Authorized Signatory(ies)	1.
	2.
Print Name(s) and Position(s) of Authorized Signatory(ies)	1.
	2.