



## **REQUEST FOR PROPOSALS No. 21-066**

### **Electronic Signature Solution**

**ISSUED:** August 3, 2021

#### **CLOSING DATE AND TIME:**

Submissions must be received on or before:  
**3:00 PM (15:00 hrs) Local Time on August 31, 2021**

#### **Submissions and Questions are to be directed to:**

Gary Jurasek, Manager  
Information Technology & Geographic Information Systems  
Telephone: 250-390-6532  
Email: [GJurasek@rdn.bc.ca](mailto:GJurasek@rdn.bc.ca)

Questions are requested at least five (5) business days before the closing date.

#### **Proponent's Information Meeting:**

No Proponent's meeting will be held

Proposals will not be opened in public



## **Instructions to Proponents**

### **Closing Date/Time/Submission Method**

Submissions must be received on or before 3:00 PM (15:00 hrs), Local Time, on August 31, 2021.

Submission Method:

By Email: In PDF format with “21-066 Electronic Signature Solution” as the subject line at this electronic address:

[GJurasek@rdn.bc.ca](mailto:GJurasek@rdn.bc.ca)

Please note: Maximum email file size limit is 20MB, or less. The RDN will not be liable for any technological delays of submissions.

Submissions received in any other manner will not be accepted.

### **Amendment to Proposals**

Proposals may be amended in writing and sent via email to the RDN contact person identified on the cover page on or before the closing. Such amendments should be signed by the authorized signatory of the Proponent.

### **Addenda**

If the RDN determines that an amendment is required to this RFP, the RDN will post the Addendum on the RDN ([www.rdn.bc.ca](http://www.rdn.bc.ca)) and BC Bid ([www.bcbid.gov.bc.ca](http://www.bcbid.gov.bc.ca)) websites. Each addendum will be incorporated into and become part of the RFP. No amendment of any kind to the RFP is effective unless it is contained in a written addendum issued by the RDN. It is the sole responsibility of the Proponent to check and ensure all amendments are included prior to submitting their final Proposal.

### **Withdrawal of Proposals**

The Proponent may withdraw their Proposal at any time by submitting a written withdrawal email to the RDN contact person identified on the cover page on or before the closing.

### **Unsuccessful Vendors**

The District will offer debriefings to unsuccessful Proponents, on request, at a mutually agreeable time.



## **1. INTRODUCTION**

The purpose of this Request for Proposal is to solicit submissions from experienced and qualified firms to provide an electronic signature solution to enable the Regional District of Nanaimo (RDN) to deliver a simple, seamless experience of applying digital signatures for online transactions with an integrated, end-to-end workflow process for a five (5) year term.

## **2. BACKGROUND**

The Regional District of Nanaimo provides regional governance and services throughout Vancouver Island's beautiful central east coast. Communities within the RDN include the municipalities of Nanaimo, Lantzville, Parksville, and Qualicum Beach, as well as seven unincorporated Electoral Areas. Established in 1967, the RDN is British Columbia's fifth-most populous Regional District and home to more than 155,000 people.

The RDN is extending its 'Digital First' approach. As part of this initiative, the RDN wants to expand online services and requires the ability for staff and external parties to easily and securely be able to digitally sign a variety of contracts, development applications, voucher/expenditure submissions to the finance department, and general documents.

In 2019, on a trial basis, the RDN purchased 500 DocuSign envelopes to enable Board Members, Directors, and the Leadership Group to become familiar with signing and managing documents electronically. The RDN administration team was given 'Super User' training to manage and coordinate all documents.

## **3. SCOPE OF SERVICES**

The RDN and different department's expectations from the solution.

1. The RDN prefers a cloud-based solution, and all data must reside in Canada. The solution should ensure scalability and adaptability to future business needs and technology changes. The proposed solution must be adherent with the RDN, Provincial and Federal policies, and regulations regarding privacy and data.
2. Professional services to aid the RDN in finalizing requirements, putting together an implementation strategy and detailed project timeline, and multiple advanced training to ensure smooth transition and adoption of the new system by end-users.
3. Assistance in setting up the new system architecture and configuring it for the RDN.
4. Technical and end-user training for all user roles and enhanced 'Super Admin' training.
5. The Proponent shall provide all licenses for the proposed solution provided to the RDN – note: details of the user license to be provided by the Proponent must be clearly stated in the Proposal.
6. Once the solution is accepted by the RDN, the Proponent will provide all required services to ensure adequate technical support and maintenance both during roll-out; continuing thereafter for future prescribed periods, details of which will be defined within support and maintenance



agreements with the RDN before contract award. The Proponent will work with the RDN's representatives to develop and agree upon a Service Level Agreement (SLA).

7. Consultation and development of a proper workflow management system. Some expectations from individual departments-
  - a. The RDN Finance department uses this solution for invoice processing, voucher submissions, expenditure claims, vendor payment processing, etc. Currently, these are done manually using the software VADIM. The department hopes to find a solution that will support the department to get rid of paper-based processes.
  - b. The Planning department intends to use this solution to collect signatures on development applications and other documents from residents, board members, and employees. The current software in use – CityView
  - c. The By-Law team wants to use this software to collect signatures on various documents, PDFs from residents, employees, and board members. The current software in use is CityView
  - d. The Legislative department wants to use this software to collect signatures from Board members on Board Agendas and other proposals from Board Members/residents.
  - e. The HR department currently uses SAP SuccessFactors. They intend to use it in the future to collect documents/signatures from job candidates and existing employees as and where applicable.
8. The solution is expected to be a comprehensive one that is based on field-tested software, technical components and should already be in the market and being used by similar organizations for more than a year.
9. The RDN has approx. 490 employees. All costs (envelope based/user based) should be clearly stated in the RFP

The RDN prefers cloud solutions. However, the RDN is open to considering an on-premises solution if that can be proved to offer the best value for the RDN.

All proponents are requested to complete Appendix 1 and include it as part of the RFP submission.

#### **4. PROPOSAL SUBMISSION AND EVALUATION**

Following the initial Proposal evaluation process listed below, the RDN expects to create a shortlist of the top two (2) proponents who will be asked to provide a detailed demonstration of their software at either the RDN's office in Nanaimo or via a virtual demonstration. The demonstration will form part of the overall evaluation.

Evaluation Criteria	Description	Weight
Corporate background, qualifications, capabilities, and experience of the proponent.	Demonstrated ability to provide services, and proven expertise, in the areas listed in this RFP and a statement on why the RDN should select your firm.	60%
Functional and Technical Capabilities, Appendix 1, Quality Control, Demonstration	The degree to which requirements can be met by the proponent's solution and the overall suitability of the functionality proposed for the RDN's needs. Degree of alignment/support of our technology guiding principles, current technical infrastructure and anticipated future technical infrastructure	
Implementation	Suitability of proposed implementation approach and qualifications and experience of the proponent's staff identified as being assigned to this project	
Training	Training plan and strategy for Super Users and all employees	
Post purchase Support Services and Agreement	Describe your Client Support Services. Include a copy of your License Agreement for review and evaluation.	
Financial	Fixed costs (envelope based/user based), in Canadian Dollars, for years 1, 2, 3, 4, & 5. Envelope costs will be based on 500 envelopes per year for evaluation purposes only. Exact quantity will differ depending on adoption. At this time, the RDN cannot guarantee any volume.	40%

References may be requested from the highest ranked proponent and may form part of the overall evaluation.

Proposals will be evaluated on the following basis 60% Technical, 40% Financial.

The lowest price proposal based on the total 5-year cost will receive full marks. Other proposals will receive reduced scores based on the proportion higher than the lowest price. i.e. Score = Min Cost/Cost x Fee Points.

Proposals submitted should be in enough detail to allow the RDN to determine the Proponent's qualifications and capabilities from the documents received. The selection committee, formed at the RDN's sole discretion, will score the Proposals in accordance with the criteria provided.

The RDN may evaluate proposals on a comparative basis by comparing one proponent's proposal to another proponent's proposal. The RDN reserves the right to not complete a detailed evaluation if the



RDN concludes the proposal is materially incomplete or, irregular or contain any financial or commercial terms that are unacceptable to the RDN.

The selection committee may proceed with an award recommendation or the RDN may proceed to negotiate with the highest evaluated proponent with the intent of developing an agreement. If the parties after having bargained in good faith are unable to conclude a formal agreement, the RDN and the Proponent will be released without penalty or further obligations other than any surviving obligations regarding confidentiality and the RDN may, at its discretion, contact the Proponent of the next best rated Proposal and attempt to conclude a formal agreement with it, and so on until a contract is concluded or the proposal process is cancelled.

The RDN reserves the right to award the assignment in whole or in part or to add or delete any portion of the work. Throughout the evaluation process, the evaluation committee may seek additional clarification on any aspect of the Proposal to verify or clarify the information provided and conduct any background investigation and/or seek any additional information it considers necessary.

## **5. GENERAL CONDITIONS**

### **5.1 No Contract**

By submitting a Request for Proposal and participating in the process as outlined in this RFP, proponents expressly agree that no contract of any kind is formed until a fully executed contract is in place.

### **5.2 Privilege Clause**

The lowest or any proposal may not necessarily be accepted.

### **5.3 Acceptance and Rejection of Submissions**

This RFP does not commit the RDN, in any way to select a preferred Proponent, or to proceed to negotiate a contract, or to award any contract. The RDN reserves the right in its sole discretion cancel this RFP, up until award, for any reason whatsoever

The RDN may accept or waive a minor and inconsequential irregularity, or where applicable to do so, the RDN may, as a condition of acceptance of the Submission, request a Proponent to correct a minor or inconsequential irregularity with no change in the Submission.

### **5.4 Conflict of Interest**

Proponents shall disclose in their Proposals any actual or potential Conflict of Interest and existing business relationships it may have with the RDN, its elected officials, appointed officials, or employees.

### **5.5 Solicitation of Board Members and RDN Staff**

Proponents and their agents will not contact any member of the RDN Board or RDN Staff with respect to this RFP, other than the RDN Contact named in this document.



### ***5.6 Litigation Clause***

The RDN may, in its absolute discretion, reject a Proposal submitted by Proponent, if the Proponent, or any officer or director of the Proponent is or has been engaged either directly or indirectly through another corporation in legal action against the RDN, its elected or appointed officers and employees in relation to:

- (a) any other contract for works or services; or
- (b) any matter arising from the RDN's exercise of its powers, duties, or functions under the Local Government Act, Community Charter, or another enactment within five years of the date of this Call for Proposals.

In determining whether to reject a Proposal under this clause, the RDN will consider whether the litigation is likely to affect the Proponent's ability to work with the RDN, its consultants and representatives and whether the RDN's experience with the Proponent indicates that the RDN is likely to incur increased staff and legal costs in the administration of this Contract if it is awarded to the Proponent.

### ***5.7 Exclusion of Liability***

Proponents are solely responsible for their own expenses in preparing and submitting a Proposal and for any meetings, negotiations, or discussions with the RDN. The RDN will not be liable to any Proponent for any claims, whether for costs, expense, losses or damages, or loss of anticipated profits, or for any other matter whatsoever, incurred by the Proponent in preparing and submitting a Proposal, or participating in negotiations for a Contract, or other activity related to or arising out of this RFP. Except as expressly and specifically permitted in these Instructions to Proponents, no Proponent shall have any claim for compensation of any kind whatsoever, because of participating in this RFP, and by submitting a Proposal each Proponent shall be deemed to have agreed that it has no claim.

### ***5.8 Ownership of Proposals***

All Proposals, including attachments and any documentation, submitted to and accepted by the RDN in response to this RFP become the property of the RDN.

### ***5.9 Freedom of Information***

All submissions will be held in confidence by the RDN. The RDN is bound by the Freedom of Information and Protection of Privacy Act (British Columbia) and all documents submitted to the RDN will be subject to provisions of this legislation. The successful vendor and value of the award is routinely released.

## Appendix 1

This form will be used by RDN Information Services (IS) team to evaluate and review the proposed solution. Please note that, all assistance required from RDN IS team must be clearly stated here.

- **Legislative Requirements: Vendor/Solution provider must ensure all data will reside within Canada. If not, this needs to be highlighted clearly with explanation in this form.**
- **Data Encryption: Raw or Personally Identifiable Information (PII) data cannot be stored in any database/storage without proper encryption in place. Vendor needs to clearly state if any exception is required.**

If the proposed solution is 'On Premise', please complete Section 1, else complete Section 2

### Section 1. On-Premise Solution

Items	Feature	Yes/No	Included/additional cost	Details (version, requirements, limitations etc.)
Authentication	Microsoft Active Directory Integration?	Yes/No	Included/Addon	
Data Residency	All data needs to reside/host in a server located in Canada.	Yes/No	Included/Addon	
Data Encryption	All raw PII data must be encrypted before entering/saving/storing in Database	Yes/No	Included/Addon	
Server (vendor provided)	Are you providing the Server PC? If yes, please share the detail configuration	Yes/No	Included/Addon	
Server (RDN Provided)	Please share the configuration of server you need (OS, Storage, Processing Speed etc.)	Yes/No	Included/Addon	
	Virtual Machine compatible? (Hyper-V Virtual Machine compatibility is preferred by the RDN) (Please share details)	Yes/No	Included/Addon	
AD Integration	Active Directory Integration? Any marketplace app for Azure AD? Explain the process please.	Yes/No	Included/Addon	
SharePoint Integration	Does this software integrate with On-Premise SharePoint 2019?	Yes/No	Included/Addon	
APIs	Any APIs needs to be configured in the Server PC that may need help from RDN IS Team?	Yes/No	Included/Addon	



Access	Please explain Access to the Solution: Local user can access using client server and Remote user uses terminal services.	Yes/No	Included/Addon	
	Access via native windows application or web-based access?	Yes/No		
Remote Access	Do you as the vendor require remote access to the system for configuration or regular maintenance? Explain access methods.	Yes/No	Included/Addon	
Maintenance	Please explain what kind of maintenance plan is included and what support is expected from RDN IS team's end?	Yes/No	Included/Addon	
Controls	Most of the Control Should reside within RDN.	Yes/No	Included/Addon	
Backup and Security	Please explain how the solution backup and database security will be taken care of? (i.e.- By RDN IS Team or by manager services by you)	Yes/No	Included/Addon	
Installation	Installation/configuration help needed from RDN? If yes, please write detailed expectation.	Yes/No	Included/Addon	
Additional Details				

## Section 2. Cloud Hosted Solution

Items	Feature	Yes/No	Included/additional cost	Details (version, requirements, limitations etc.)
Preferred Cloud Solution	Aws <input type="checkbox"/> Azure <input type="checkbox"/> Vendor's Storage <input type="checkbox"/>	Yes/No	Included/Addon	
Cloud Type Preference	Private <input type="checkbox"/> Public <input type="checkbox"/> Hybrid <input type="checkbox"/>	Yes/No		
Data Residency	All data needs to reside/host in a server located in Canada.	Yes/No	Included/Addon	
Data Encryption	All data must be encrypted before entering/saving/storing in Data Base	Yes/No	Included/Addon	
Installation/Configuration	Will you install and configure the solution in Cloud?	Yes/No		
Authentication	Azure Active Directory Integration? Any market place app?	Yes/No		
Cloud Server (if RDN need to provide)	Please share the configuration of server you need (IaaS/PaaS/SaaS, Storage, scalability, back up etc.)	Yes/No	Included/Addon	
SharePoint Integration	Will this integrate with On-Premise SharePoint 2019?	Yes/No	Included/Addon	
APIs	Any APIs needs to be configured in that may need help from RDN IS Team?	Yes/No	Included/Addon	
Access	Please explain user management and roles to the Solution	Yes/No	Included/Addon	
	Access via native windows application or web-based access?	Yes/No	Included/Addon	
Maintenance	Please explain what kind of maintenance plan is included and what support is expected from RDN IS team's end?	Yes/No	Included/Addon	

Controls	RDN should have Full Administrator rights/highest access	Yes/No	Included/Addon	
IoT	Any additional items that's being added from IoT or other marketplaces?	Yes/No	Included/Addon	
Backup	Please explain the backup and disaster recovery plan for your solution	Not Applicable	Included/Addon	
Additional Details				