



Request for Proposals

Microsoft SharePoint Advisory and Support Services

Solicitation No.: **CAN 2024-018**

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Submission Deadline: **Displayed on Canoe's Procurement Portal**

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PART A – INVITATION AND SUBMISSION INSTRUCTIONS

1.1 Invitation to Proponents

1.1.1 Invitation

This Request for Proposals (the “RFP”) is an invitation by Canoe Procurement Group of Canada (“Canoe”) to prospective vendors on behalf of its current and future members for the supply of Microsoft SharePoint Advisory and Support Services as further described in PART B - RFP Particulars (the “Deliverables”).

The successful proponent(s) will be invited to enter into an agreement for the Deliverables for Canoe Procurement Group of Canada current and future members.

1.1.2 About Canoe Procurement Group of Canada

CANOE is the lead agency and procurement authority in a group of partners representing MASH, public sector, and not-for-profit entities across Canada. CANOE is a trade name of the Rural Municipalities of Alberta (RMA), a public entity incorporated in 1923 [by Alberta legislation](#) who has been executing Group Procurement on behalf of its members for 100 years. CANOE is registered in a number of provinces and territories across Canada. On behalf of its partner organizations, CANOE facilitates a competitive solicitation and contracting process on behalf of and based on the needs of itself and Members. This process results in regional and/or national compliant procurement contract solutions with various Suppliers of products, equipment and services which current and future Members can utilize.

CANOE is governed by publicly elected officials that serve as the RMA Board of Directors. RMA’s Board of Directors oversee and authorize the calls for all new proposals and holds those resulting contracts for the benefit of its own and Members’ use.

CANOE currently serves over 5000 Members nationally. Both membership and utilization of CANOE contracts continue to expand, due in part to the increasing acceptance of cooperative purchasing throughout the government and education of communities nationally. CANOE is currently partnered with the following provincial counterparts:

Province/Territory	Association
Alberta	Rural Municipalities of Alberta (“RMA”)
British Columbia	Civicinfo BC (“Civicinfo”)
Manitoba	Association of Manitoba Municipalities (“AMM”)
New Brunswick	Union of the Municipalities of New Brunswick (“UMNB”)
Newfoundland & Labrador	Municipalities Newfoundland & Labrador (“MNL”)
Northwest Territories	Northwest Territories Association of Communities (“NWTAC”)
Nova Scotia	Nova Scotia Federations of Municipalities (“NSFM”)
Nunavut	Nunavut Association of Municipalities (“NAM”)
Ontario	Local Authority Services (“LAS”)

Prince Edward Island	Federation of PEI Municipalities (“FPEIM”)
Saskatchewan	Saskatchewan Association of Rural Municipalities (“SARM”)
Yukon Territory	Association of Yukon Communities (“AYC”)

In addition, the resulting contracts from this RFP can be used by:

- Indigenous self-governing bodies;
- Airport authorities;
- Publicly funded school boards, academic, health, and social service agencies;
- Cities, their agencies, commissions, transit, housing authorities;
- Federal, Provincial and territorial governments, Crown corporations, government enterprises, and other entities that are owned or controlled by these entities through ownership interest.

For a list of current and future CANOE members, as well as the current members of the provincial associations represented in this RFP, and other entities represented in this RFP see <https://canoeprocurement.ca/canoe-current-future-members/> .

1.1.3 Use of Canoe Contracts

Members typically access contracted goods or services through a purchase order issued directly to the awarded supplier. A Member may request additional terms or conditions related to a purchase and use a participating addendum. Use of Canoe contracts is voluntary, and Members retain the right to obtain similar equipment, products, or services from other sources.

1.1.4 Public notice of opportunities

Canoe broadly publishes public notice of all solicitation opportunities, including this RFP on the following websites:

- www.bcbid.gov.ca
- www.purchasingconnection.ca
- www.sasktenders.ca
- www.merx.com
- www.gpa.gov.nl.ca
- www.gov.pe.ca/tenders
- www.nbon-rpanb.ca
- www.novascotia.ca/tenders
- <https://canadabuys.canada.ca/en>
- <https://canoe.bidsandtenders.ca/Module/Tenders/en>

1.1.5 Proponent Must Be Single Entity

The proponent must be a single legal entity that, if selected, intends to negotiate and enter into the contract with Canoe. If the proposal is being submitted jointly by two (2) or more separate entities, the proposal must identify only one (1) of those entities as the “proponent”. The proponent will be responsible for the performance of the Deliverables.

1.1.6 Procurement Portal Registration

All proponents must have a vendor account with Canoe's electronic Procurement Portal at: <https://canoe.bidsandtenders.ca/> and must be registered as a plan taker for this opportunity. This will enable the proponent to download the solicitation document, to ask questions, to receive addenda email notifications, download addenda, and submit their proposal electronically through the Procurement Portal.

1.2 RFP Contact

To contact Canoe in relation to this RFP, proponents must initiate the communication electronically through the Procurement Portal. Canoe will not accept any proponent's communications by any other means, except as specifically stated in this RFP.

All communication in relation to this RFP, up to and including the submission of the proposal, must be through the Procurement Portal, as described above.

Any Questions regarding this RFP must also be submitted through the Procurement Portal. Answers to questions will be issued through an addendum to this RFP.

Proponents and their representatives are not permitted to contact any employees, officers, agents, elected or appointed officials, or other representatives of Canoe, other than the RFP Contact, concerning matters regarding this RFP. Failure to adhere to this rule may result in the disqualification of the proponent and the rejection of the proponent's proposal.

1.2.1 Proponents to Review RFP

Proponents should promptly examine all of the documents comprising this RFP and may direct questions or seek additional information in writing through the procurement portal on or before the Deadline for Questions. No such communications are to be sent or initiated through any other means. Canoe is under no obligation to provide additional information, and Canoe is not responsible for any information provided by or obtained from any source other than the RFP Contact or the bidding system. It is the responsibility of the proponent to seek clarification on any matter it considers to be unclear. Canoe is not responsible for any misunderstanding on the part of the proponent concerning this RFP or its process.

1.2.2 All New Information to Proponents by Way of Addenda

This RFP may be amended only by addendum in accordance with this section. If Canoe, for any reason, determines that it is necessary to provide additional information relating to this RFP, such information will be communicated to all proponents by addendum posted in the procurement portal. Each addendum forms an integral part of this RFP and may contain important information, including significant changes to this RFP. Proponents are responsible for obtaining all addenda issued by Canoe from the Procurement Portal.

1.3 Contract for Deliverables

1.3.1 Type of Contract

The selected proponent(s) will be requested to enter into direct contract negotiations to finalize an agreement with Canoe for the provision of the Deliverables. The terms and conditions found in the Form of Agreement Part E – Draft Master Agreement are to form the basis for commencing negotiations between Canoe and the selected proponent(s).

The selected proponent(s) will be requested to enter into a Contract with Canoe for the provision of the Deliverables.

1.3.2 Term of Contract

The initial term of agreement will be for a three-year term; subject to favorable annual performance evaluations based on the successful completion of services. Canoe, in its sole discretion and option, reserves the right to extend the agreement with the successful proponent(s), to which the total contract term, including all extensions, will not exceed 5 years.

1.4 RFP Timetable

1.4.1 Key Dates

Issue Date of RFP	See Procurement Portal
Deadline for Questions	See Procurement Portal
Deadline for Issuing Addenda	72 hours before Submission Deadline
Submission Deadline	See Procurement Portal
Rectification Period	3 business days if required
Anticipated Execution of Agreement	December 2024

The RFP timetable is tentative only and may be changed by Canoe at any time. For greater clarity, business days means all days that Canoe is open for business.

1.5 Submission Instructions

1.5.1 Submission of Proposals

Proposals must be submitted electronically through the Procurement Portal at:

<https://canoe.bidsandtenders.ca/Module/Tenders/en>

Submissions by other methods will not be accepted. In the event of any technical issues, proponents should contact the Procurement Portal's technical support.

1.5.2 Proposals to Be Submitted on Time

Proposals must be finalized and fully uploaded in the Procurement Portal on or before the Submission Deadline. The time of receipt of proposals shall be determined by the Procurement Portal web clock. Late submissions will not be accepted by the Procurement Portal.

Proponents are cautioned that the timing of submission is based on when the proposal is received by the Procurement Portal, not when a proposal is submitted by a proponent. As transmission can be delayed due to file transfer size, transmission speed, or other technical factors, proponents should plan to submit proposals well in advance of the Submission Deadline to avoid submitting late due to technical issues. Proponents submitting near the Submission Deadline do so at their own risk.

The Procurement Portal will send a confirmation email to the proponent advising when the proposal was submitted successfully. If you do not receive a confirmation email, contact the Procurement Portal's technical support immediately.

1.5.3 Proposals to Be Submitted in Prescribed Format

Proponents must answer specification questionnaires directly into Canoe's Procurement Portal. Proposal materials should be prepared and submitted in accordance with the instructions in the Procurement Portal, including any maximum upload file size.

Documents should not be embedded within uploaded files, or referred to into the specification questionnaires as the information may not be accessible or evaluated.

1.5.4 Amendment of Proposals

Proponents may amend their proposals directly into the Procurement Portal prior to the Submission Deadline. However, the proponent is solely responsible for ensuring that the amended proposal is received by the Procurement Portal by the Submission Deadline.

1.5.5 Withdrawal of Proposals

At any time throughout the RFP process until the execution of a written agreement for provision of the Deliverables, a proponent may withdraw a submitted proposal. Prior to the Submission Deadline, proponents may withdraw a submitted proposal through the Procurement Portal. To withdraw a proposal after the Submission Deadline, a notice of withdrawal must be sent to the RFP Contact and must be signed by an authorized representative of the proponent.

[End of Part A]

PART B – RFP PARTICULARS

A. THE “DELIVERABLES”

SOLUTIONS-BASED SOLICITATION

This solicitation and contract award process is a solutions-based solicitation; meaning that Canoe is seeking services that meet the general requirements of the scope of this RFP and that are commonly desired or are required by industry standards.

The scope of this RFP is Microsoft SharePoint Advisory and Support Services. Proponents may include related services to the extent that these solutions are complementary to the commodity being proposed.

1. Requested services

Canoe seeks to engage qualified IT service provider(s) to deliver advisory and support services for the implementation of Microsoft SharePoint for their current and future Members. The provider(s) will be responsible for assisting with the design, deployment, and ongoing support of SharePoint solutions tailored to the unique needs of the Members, focusing on optimizing collaboration, document management, and workflow automation.

Objectives:

- Provide expert advisory services on SharePoint implementation, including design and configuration tailored to Members’ operational needs for Members requiring E5/G5 licensing structure.
- Ensure a seamless deployment of SharePoint, including data migration, integration with existing systems, and user adoption strategies.
- Deliver ongoing technical support and training to ensure successful long-term use and optimization of SharePoint.

Services included in this RFP:

- 1. Assessment & Planning**
 - Conduct an in-depth assessment of the Members’ current IT infrastructure, document management needs, and collaboration workflows.
 - Develop a detailed implementation roadmap, including system design, migration strategy, risk management, and user adoption plan.
- 2. Implementation Support**
 - Provide hands-on support for the installation, configuration, and deployment of SharePoint, ensuring seamless integration with existing platforms (e.g., Microsoft 365).
 - Assist with data migration from legacy systems to SharePoint while maintaining data integrity and security.
- 3. Customization & Development**
 - Customize SharePoint features and functionalities, including creating custom workflows, forms, and document libraries to meet Members’ requirements.
 - Develop SharePoint solutions to enhance collaboration, document management, and workflow automation across Member organizations.

4. **Training & Documentation**

- Provide training sessions for key stakeholders and end-users on how to effectively use SharePoint, ensuring high user adoption rates.
- Develop comprehensive documentation, including user manuals and system guides, for ongoing internal reference and use.

5. **Ongoing Support & Maintenance**

- Offer ongoing technical support for troubleshooting, system updates, and bug fixes post-implementation.
- Provide regular system health checks, including performance optimization and security updates.

Examples of Key Deliverables:

- Detailed SharePoint Implementation Roadmap
- Fully Configured SharePoint Environment
- Data Migration Report
- User Training Sessions and Documentation
- Ongoing Technical Support and Maintenance Plans

Certifications and Memberships:

- **Microsoft Partner Credentials:**

The service provider must hold 1 or more of the following Microsoft credentials:

- Modern Work
- Content AI Partner
- SharePoint Server Hybrid
- Modern Desktop Administrator Associate
- Azure Solutions Architect Expert (for cloud-hosted SharePoint services)

- **Membership to Records and Information Management organizations:**

The service provider must be a member of 1 or more of the following professional association:

- Association of Records Managers and Administrators (ARMA)
- The Institute of Certified Records Managers (ICRM)
- The Association for Intelligent Information Management (AIIM)

Performance requirement:

Canoe will require Approved Suppliers maintain current their Microsoft Partner Credentials as well as Membership to Records and Information Management organizations for the duration of the Program Agreement. Failure to do so will result in material breach of the agreement and subject to termination.

2. Utilisation of the contract – Canoe Members

Canoe Members may choose but are not obligated to utilise the services during the term of the agreement. There is no minimum guarantee of usage.

3. Requirements

Proponents should provide a compelling proposal that will easily and clearly show overall best value based on the scope represented in this Solicitation. Best value will include but not be limited to addressing the following in your RFP submission:

- Competitive pricing across the span of services offered beyond a defined service offering;
- Our Members ask; how fast, how much, how can I access the services, how can I set up my own review, does it matter where I'm located, how easy is it to access the services, how does this support the local economy and is this trade agreement compliant, can my entity benefit by using this contract, is there someone that can answer my questions, do you care about me as a customer, what is the level of service I can expect, how will this impact my entity's operations and bottom line effectively?

To support an industry leading value-based solution, Canoe is requesting that all interested proponents provide a thorough and comprehensive description of their ability to deliver on the Deliverables when answering the questions in the Procurement Portal.

B. MANDATORY SUBMISSION REQUIREMENTS

1. Submission and Specification Questionnaires

Proponents must answer specification questionnaires directly into Canoe's Procurement Portal. Proposal materials should be prepared and submitted in accordance with the instructions in the Procurement Portal, including any maximum upload file size.

Proponents should refer to the instructions in the Procurement Portal and provide all required information in accordance with the instructions provided.

Contractors are required to submit the following information in the Procurement Portal:

Mandatory Submission Requirements	Source of information
Provide in the Procurement Portal proof of 1 or more current Microsoft Partner Credential(s) : <ul style="list-style-type: none"> ○ Modern Work ○ Content AI Partner ○ SharePoint Server Hybrid ○ Modern Desktop Administrator Associate ○ Azure Solutions Architect Expert (for cloud-hosted SharePoint services) 	Document from Microsoft
Provide in the Procurement Portal proof of 1 or more current membership to Records and Information Management organizations: <ul style="list-style-type: none"> ○ Association of Records Managers and Administrators (ARMA) ○ The Institute of Certified Records Managers (ICRM) ○ The Association for Intelligent Information Management (AIIM) 	Letter from the Record and Information Management Organisation(s).

2. Pricing

Each proposal must include pricing information that complies with the instructions set out in the Procurement Portal.

C. MANDATORY TECHNICAL REQUIREMENTS

Proponents should refer to the instructions in the Procurement Portal and provide all required information in accordance with the instructions provided in the Procurement Portal.

D. PRE-CONDITIONS OF AWARD

- Submission of proof of insurance
- Satisfactory reference check if required by Canoe

E. EVALUATION CRITERIA

The following sets out the categories, weightings, and descriptions of the rated criteria of the RFP. Proponents who do not meet a minimum threshold score for a category will be deemed non-compliant and not proceed to the next stage of the evaluation process.

Proponents must provide their response in Canoe's procurement portal.

Non-Price Rated Criteria Category	Points	Minimum points
Experience -Past experience with public entities using E5/G5 licensing structure -Market share	30	12
Program offering -Services offered -Quality standards -Workforce and resource availability	15	9
Service excellence, Members' ease of access to service offering	15	9
Engagement, marketing and training plan	10	6
Pricing -Discounts offered -Pricing structure -Administrative fee	30	
Total Points	100	

Proponents should refer to the instructions in the Procurement Portal and provide all required information in accordance with the instructions provided in the Procurement Portal.

F. PRICE

Pricing is worth 30 points of the total score.

Instructions on How to Provide Pricing

- (a) Proponents should submit their pricing information electronically within the Procurement Portal.
- (b) Rates must be provided in Canadian funds, exclusive of all applicable duties and taxes.
- (c) Unless otherwise indicated in the requested pricing information, rates quoted by the proponent must be all-inclusive and must include all other overhead, including any fees or other charges required by law.

G. AWARD

Canoe will invite the top proponent(s) to enter into a master agreement for the services for Canoe Members.

[End of Part B]

PART C – EVALUATION, NEGOTIATION AND AWARD

1.1 Stages of Evaluation and Negotiation

Canoe will conduct the evaluation of proposals and negotiations in the following stages:

1.2 Stage I – Mandatory Submission Requirements

Stage I will consist of a review to determine which proposals comply with all of the mandatory submission requirements. If a proposal fails to satisfy all of the mandatory submission requirements, Canoe will issue the proponent a rectification notice identifying the deficiencies and providing the proponent an opportunity to rectify the deficiencies. If the proponent fails to satisfy the mandatory submission requirements within the Rectification Period, its proposal will be rejected. The Rectification Period will begin to run from the date and time that Canoe issues a rectification notice to the proponent. The mandatory submission requirements are set out in Part B - RFP PARTICULARS.

1.3 Stage II – Evaluation

Stage II will consist of the following two (2) sub-stages:

1.3.1 Mandatory Technical Requirements

Canoe will review the proposals to determine whether the mandatory technical requirements as set out in Part B - RFP PARTICULARS have been met. If a proposal fails to satisfy all of the mandatory technical requirements, Canoe will issue the proponent a rectification notice identifying the deficiencies and providing the proponent an opportunity to rectify the deficiencies. The rectification process for these requirements may occur after any rectification process for mandatory submission requirements. Proposals that do not satisfy the mandatory technical requirements within the Rectification Period will be rejected.

1.3.2 Non-Price Rated Criteria

Canoe will evaluate each qualified proposal on the basis of the non-price rated criteria as set out under Evaluation Criteria in Part B - RFP PARTICULARS.

1.4 Stage III – Pricing

Stage III will consist of a scoring of the submitted pricing of each qualified proposal. The evaluation of price will be undertaken after the evaluation of mandatory requirements and rated criteria has been completed.

In the event that a proponent's pricing appears to be abnormally low in relation to the Deliverables, Canoe may require the proponent to provide a detailed explanation of the pricing information to account for the low level of price and confirm that all requirements in respect of the Deliverables have been taken into account. If the proponent is unable to satisfactorily account for the abnormally low pricing, Canoe may reject the proposal. Canoe may also reject any proposal that contains unbalanced pricing. Pricing may be considered unbalanced where nominal or significantly understated prices are proposed for some elements of the Deliverables and inflated prices are proposed for other elements of the Deliverables. Unbalanced pricing includes, but is not limited to, "front-loaded" pricing which contains inflated pricing for Deliverables to be provided or completed at the beginning of the contract, offset by understated pricing for Deliverables to be provided or completed later in the contract.

1.5 Stage IV – Ranking and Contract Negotiations

1.5.1 Ranking of Proponents

After the completion of Stage III, all scores from Stage II and Stage III will be added together and the proponents will be ranked based on their total scores. The top-ranked proponent(s) will receive a written invitation to enter into direct contract negotiations to finalize the agreement with Canoe. In the event of a tie, the selected proponent will be the proponent with the highest score on the non-price rated criteria.

1.5.2 Contract Negotiation Process

Any negotiations will be subject to the process rules contained in the Part D – TERMS AND CONDITIONS OF THE SOLICITATION PROCESS and will not constitute a legally binding offer to enter into a contract on the part of Canoe or the proponent, and there will be no legally binding relationship created with any proponent prior to the execution of a written agreement. The terms and conditions found in the Draft Form of Agreement (Part E) are to form the basis for commencing negotiations between Canoe and the selected proponent. Negotiations may include requests by Canoe for supplementary information from the proponent to verify, clarify, or supplement the information provided in its proposal or to confirm the conclusions reached in the evaluation, and may include requests by Canoe for improved pricing or performance terms from the proponent.

1.5.3 Time Period for Negotiations

Canoe intends to conclude negotiations and finalize the agreement with the top-ranked proponent during the Contract Negotiation Period (15 calendar days), commencing from the date Canoe invites the top-ranked proponent to enter negotiations. A proponent invited to enter into direct contract negotiations should therefore be prepared to satisfy the pre-conditions of award listed in Part B - RFP PARTICULARS provide requested information in a timely fashion, and conduct its negotiations expeditiously.

1.5.4 Failure to Enter into Agreement

If the pre-conditions of award listed in Part B - RFP PARTICULARS are not satisfied or if the parties cannot conclude negotiations and finalize the agreement for the Deliverables within the Contract Negotiation Period, Canoe may discontinue negotiations with the top-ranked proponent and may invite the next-best-ranked proponent to enter into negotiations. This process will continue until an agreement is finalized, until there are no more proponents remaining that are eligible for negotiations, or until Canoe elects to cancel the solicitation process.

1.5.5 Notification of Negotiation Status

Other proponents that may become eligible for contract negotiations may be notified at the commencement of the negotiation process with the top-ranked proponent(s).

[End of Part C]