

Request for Proposals for IT Consultant

Date of Issue: Monday, June 1, 2020
Submission Deadline: Friday, June 12, 2020, 4:00 pm
Expected Date of Award: Monday, June 26, 2020

Overview

Keystone Agricultural Producers (KAP) is seeking proposals from qualified information technology consultants to assist the project team with vendor selection for a new electronic Environmental Farm Plan (eEFP) online platform and database.

Background

KAP is Manitoba's general farm policy organization, representing and promoting the interests of thousands of agricultural producers in Manitoba. KAP works for farmers by advocating for policies that will keep Manitoba's agriculture industry profitable, sustainable, and globally competitive. KAP policy is developed by farmers and commodity group members representing all agricultural commodities and all regions of Manitoba.

The Environmental Farm Plan (EFP) program is a voluntary, self-assessment process that helps farm managers identify on-farm environmental assets and risks and develop an action plan to address those risks. The EFP is offered as a Strategic Initiative under the Environment Program federal provincial Canadian Agricultural Partnership (CAP) Agreement.

Manitoba Agriculture and Resource Development (ARD) is responsible for the maintenance of the content in the EFP Workbook and the delivery of the EFP Workshops. KAP is responsible for the administration of the EFP, including third party verification, data collection and reporting, and the EFP advisory committee.

Objective

Currently ARD delivers the EFP via in-person workshops and paper workbooks. KAP manages the data and reporting requirements using an aging unsupported Microsoft Access database.

Online learning, online documentation completion and tracking, certification and reporting should reduce administrative and travel costs and improve the experience for farmers.

Program requirements do change, which are difficult to incorporate into the manual processes. An online EFP should help keep the program up to date as the demand changes.

Similar programs are managed in Saskatchewan, Alberta, and Ontario using online platforms and systems that are of interest to KAP and ARD.

This RFP represents the first part of a larger project that includes content benchmarking, system development, and program launch.

Scope of Services

1. Confirm requirements with the project team (see Appendix)
2. Maintain project management documents and reporting
3. Develop a request for proposals
4. Establish scoring criteria
5. Create a list of recommended vendors
6. Issue the request for proposals
7. Manage incoming vendor questions and proposals
8. Score and evaluate the proposals to establish a short list
9. Make selection recommendation to the project team

Proposal Instructions

As part of your proposal, please outline how you will fulfill the requirements listed above, and include a minimum of three references with contact information, a brief company background statement, pricing, and any other information you think will help KAP make this decision.

Contact Information

All inquiries regarding this request for proposals and the final proposal should be submitted by email to:

Patty Rosher
General Manager
Keystone Agricultural Producers
patty.rosher@kap.ca

Appendix: Preliminary eEFP Requirements

LOG IN / CREATE ACCOUNT

1. The system will be designed like an online course. Adult education and self-assessment principles must be adhered to / integrated into content. The system will walk users through each step of the process.
2. The eEFP will include an account set up (Farm Info), educational component (Section A), and assessment component (Section B) and a planning component (Section C).
3. Users must be able to go to an online system.
4. Users must be able to create an account so they can save their work, leave, and return to complete it later
5. The system will have an option to download to hard drive/USB stick and complete offline, then upload data to eEFP system once complete. System will maintain all functionality offline.
 - a. Users will need printed maps in this scenario OR must complete account set up before taking offline (system must be able to export maps into offline mode).
 - b. Ability for users to bring to an ARD office to upload once complete, if needed.
6. Users require a message to be displayed upon system start-up indicating that they need hard copies of their field maps and that ARD can provide them to them OR that they can print them on their own if they'd like the eEFP to be completed offline.
7. User profiles will require an email address and a password (no separate 'account name' or 'username').
8. Users must be able to retrieve forgotten passwords via email. Administration must be able to reset passwords if self-retrieval does not work /if needed (ex: users' email account is closed, etc.).

ACCOUNT SET UP

9. Users will receive an initial 'baseline' quiz on 'agri-environmental knowledge. (After the eEFP is complete, users will receive another quiz to test the change in their 'agri-environmental knowledge'.)

10. Account set up will include information that is manually submitted by the user into fillable forms (full name, business name (name to appear on the Statement of Completion (SoC)), RM (from list), Watershed (from list))
11. Type of recipient options (non applicable items can be removed)
 - a. Primary producer
 - b. Eligible industry service providers
 - c. Indigenous community/group
12. Type of Industry options
 - a. Based on NAICS code, need to determine how this information is to be collected from the applicant
 - b. The options can be refined down to options from which they would select the ones that are most applicable to their operation. Either by drop down menu or check box.
13. Account set up will include a list of all EFPs associated with that user and the date of completion.
14. Account set up will include a prompt for users to identify all applicable Section B chapters. (Those that are applicable must be completed in full. Those that are not applicable do not need to be completed but need to be identified as “not applicable” to proceed.) OR this can be completed automatically from the producer information already entered (#11).
15. Account set up will include: The Users will enter a list of all legal locations for parcels under management
16. Account Information page will include: Information that is auto-filled from responses elsewhere in the self-assessment portion of the system (total acres managed by category, Au’s, soil limitations, etc.)
17. Log In/ Create Account
 - a. System will prevent the creation of a duplicate account if the applicant has forgotten or misplaced a password (i.e. system will use unique information such as name, address, and email address to determine whether or not a new account is needed).

- b. The applicant will be able to maintain their account (i.e. name change, address change, etc.).

USER MODES

18. The system shall have two modes: Users must be able to 'Create a new EFP' OR 'Renew an Existing EFP'
19. New eEFP: EFP is named by user and is listed on the Account Information page with a status of "In Progress"
20. New eEFP: All answers are submitted by user and saved. There shall be no information present in any of the fillable fields
21. Renewing an eEFP: The system will show a list of previously completed eEFP on the Account Information page with the date of completion
22. Renewing an eEFP: Users can select a previously completed eEFP for 'Renewal'. (Users who have never completed an EFP online must go through the 'New EFP' mode.)
23. Renewing an eEFP: Under the Renewal mode the system will make users complete preliminary educational components again (system will not save responses for tests / quizzes etc. when Renewing).
24. Renewing an eEFP: the system will show users their previous responses to self-assessment questions (ex: number of acres of different land use types, animal units, water use, list of farmstead and field sites/legal locations, and all their 3 and 4 answers in Section B).
25. Renewing an eEFP: Because they are in Renewal mode, users will have to click a "verify" button next to each response so they actively have to agree with the previous information and are not just passively re-printing the old action plan.
26. Renewing an eEFP: If users want to record a change to their previous response, they can overwrite their previous response and "save" their new response for any given question.
27. Renewing an eEFP: Any questions which have been added to the system since user last entered responses, will appear as blank mandatory fields and will be highlighted.
28. Renewing an eEFP: The previous Action Plan Responses must be verified (as the self-assessment responses are). Any questions that have been added to the system since the user last completed an EFP will appear as blank mandatory fields and will be highlighted.

EDUCATION COMPONENT

29. The education component will be guided and mandatory (content must be delivered in sequential / dependent stages). Users cannot skip over portions. It will include audio-over-text, videos, pictures, etc.
30. The education component will include self-check/testing components throughout to increase retention. Users can progress even with incorrect answers, but exercises must be complete.

ASSESSMENT COMPONENT

31. System will guide users through the Farmstead Site assessment.
32. System will produce a map for each legal location entered in account set up for the Field Site Assessment
33. System will allow users to markup maps as needed to identify soil limitations and save that annotated version of each map.
34. System will allow users to record soil limitations (quantify) for each legal location.
35. System will copy the annotated maps and identified soil limitations into the Natural Risk Assessment (Farmstead + Field Site Assessment) report/summary.
36. Users can select which Section B chapters to complete and in which order for the Management Assessment OR this can be auto generated from the account set up step.
37. System will generate required summaries and tables from information collection from users.
38. System will provide a comprehensive navigation map for users to move between Section B chapters. Easy to use layout / system functions: users must be able to see what is complete and what still needs to be done prior to completion (comprehensive navigation / site map).

PLANNING COMPONENT

39. All Section B questions that receive a 3 or 4 rating must be brought forth into Section C (as users must address these in the development of Section C – their Action Plan).
40. Section C must autofill the Section B question and all four risk responses so that users can see what the options are for consideration/use in their Action Plans.

41. User can prioritize their Action Plans. The system will re-order Actions Items by priority when exporting Section C.

FINALIZE AND SUBMIT

42. Once complete, users indicate all work is completed in full and 'finalize' their EFP (check box with notice that they are completing their EFP and allowing tombstone info to be viewed / collected by KAP).
43. Once user finalizes EFP, system will display "Complete Pending Review" on Account Information page.
44. When user finalizes EFP, KAP will be notified that there is an EFP awaiting Review. KAP to triage to Reviewers.
45. When user finalizes EFP, users will receive another quiz to test the change in their 'agri-environmental knowledge'.

SYSTEM MANAGEMENT

46. Generation of a unique client ID number. This should occur when they are creating a profile. That number should remain when they renew the EFP. This is the number that will appear on the SoC.
47. User can provide 'Review Access Code' to KAP Reviewer once eEFP finalized. Reviewer can then access eEFP content and conduct Review remotely (minimum requirement of telephone call to discuss). Review can also take place entirely in person.
48. Review Mode allows Reviewer to confirm all portions of EFP complete, add notes and recommendations as needed and submit to KAP for SoC.
49. Review Mode allows Reviewer to send notes and recommendations to client.
50. Review Mode allows Reviewer to conduct Review Questionnaire with user (if continuing).
51. Once the Review is complete, administration shall be able to change EFP status to "Complete" with a corresponding date.
52. System will auto generate SoC with client ID number and all relevant information.
53. Items to appear on SoC; unique identifier number, legal business name, contact name, expiry dates, "additional chapters" and logos.

- 54. System will notify user by email when SoC has been uploaded by KAP.
- 55. Read-only access to the database.
- 56. Type of Events (non applicable items can be removed)
 - a. Group In-Person
 - b. Conference/Trade Show

DATA MANAGEMENT

- 57. Database will collect the following information for aggregate reporting: # participants, # acres, # AUs, RM, Watershed, OTHER
- 58. Administration can view 'agri-environmental knowledge' quizzes/responses (anonymous) to track improvement of participants.
- 59. The system must allow administrative users to extract the following information:
 - a. Number of new SoCs developed by type of recipient and by type of industry
 - b. Number of existing SoCs which have been updated by type of recipient and by type of industry
 - c. Number of participants at training/knowledge transfer events by type (if applicable)
 - d. Number of renewed SoC by type of recipient and by type of industry
- 60. List of all unique SoCs by applicant name, address, email and/or unique number to cross reference with Manitoba where appropriate.
- 61. Database will incorporate all existing EFP data from KAPs existing database.

OTHER FUNCTIONS

- 62. Data must be stored for a minimum of 10 years so participants have the chance to renew (EFP SoC expires after 5 years).
- 63. System will send a notice to user 6 months prior to EFP expiry.
- 64. System will send a monthly report to KAP of all users that are about to expire.

65. System will allow User to double click any auto-compiled information to return to that screen and amend response. (IE: in Farmstead Summary – typo in farmyard name. User can double click to re-open the Farmstead Summary table and amend name).
66. System will allow for additional add-in modules/ program linkages as requested by the EFP program delivery team. Examples would be a GHG estimate tool and SAR tool and 4R Nutrient Stewardship assessments.
67. Technical content of system is easy to update (as technical data and regulations evolve).
68. System provides option for User to ask a question about any specific component in the system. System will advise User that the question has been submitted and is pending review by the Administrator. System will advise Administrator that a question has been asked, Administrator can formulate appropriate response. System will add the Administrators response to that specific component in the system under a 'People often ask' icon and will email the response directly to the User who inquired initially.
69. System will auto generate a 'Frequently asked questions' section based on the questions submitted by users. Administrator can add to this list as needed.
70. The Account Information page and Section C must export to PDF in a coherent format.
71. User can export PDF of SoC.
72. User can export eEFP once finalized. Includes Account Information page, Natural Risk Assessment, all annotated maps, and Action Plan.