

Mandatory-Criteria Compliance Matrix

Source document: Senior Service & UX Designer Consultant Services (2026-ASHC-009)

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Go / No-Go Summary

Mandatory requirements found: 77

Estimated effort: Heavy — a large mandatory load; start early and assign owners immediately.

High-risk items:

- p.13 — Proponent must submit an amount greater than zero for each part of its Fee Proposal.
- p.13 — Do not include GST in any Fee Proposal.
- p.14 — Submit Fee Proposal in Canadian dollars.
- p.25 — The Proponent shall comply with the provisions of all laws, now in force or in force after the submission of the Proposal, or parts there...
- p.33 — the Consultant shall adhere to POPA and the terms of this Contract in its collection, use and disclosure of any Personal Information
- p.34 — The Consultant shall, at its own expense, and without limiting its liabilities or obligations under this Contract obtain and maintain the...
- p.34 — general liability insurance in an amount not less than \$2,000,000 inclusive per occurrence, insuring against bodily injury, personal inju...
- p.34 — This insurance shall be endorsed to provide not less than 30 days advance written notice of cancellation to ASHC.
- p.34 — automobile liability insurance on all vehicles owned, licensed in the name of the Consultant and used in the performance of the Services ...
- p.34 — professional liability insurance, on a claims made basis, in an amount not less than \$1,000,000 per claim, insuring its liability resulti...
- p.34 — Such insurance is required to remain in place for two years following the completion or termination of this Contract.
- p.34 — The Consultant shall provide ASHC with acceptable evidence of all required insurance, in the form of a detailed certificate of insurance,...

Submission Envelope

Closing date/time: September 14, 2026 at 2:00:00 p.m. Alberta time.

Timezone: Alberta time (Mountain Daylight Time)

Submission channel: Email: ASHCProcurement@gov.ab.ca

Page limits: Package one, the RFP Qualifications Submission Should be limited to 20 single-sided, 8½" x 11" pages or equivalent (e.g. 11" x 17" sheets for charts, schedules, etc. count as 2 pages). The page limit excludes a cover letter, table of contents and individual's resumes.

Addenda: If an inquiry requires an interpretation or modification of the RFP, the response will be issued in the form of a written addendum only. Verbal replies or replies by any manner other than a written addendum are not binding on ASHC. Proponents, by submitting a Proposal, confirm receipt of all addenda issued for the RFP and confirm those addenda were considered in preparation of the Proposal.

Format rules:

- Proposals must be submitted as electronic PDF documents, searchable and unprotected

- Submit as two (2) separate documents in one email: Package one (RFP Qualifications Submission, excluding fee information) and Package two (RFP Fee Proposal Submission)
- File size of both Packages must not exceed 10 MB
- Package one (Qualifications Submission) must be limited to 20 single-sided, 8½" x 11" pages or equivalent (11" x 17" sheets count as 2 pages); page limit excludes cover letter, table of contents, and individual resumes
- Use an easy to read font type and size, such as 11 point Arial or 12 point Times-Roman
- Proposal must be organized using exact section titles, numbering, and sequence as specified in the RFP
- Each Proponent must only propose one resource per RFP response
- Fee Proposal must be submitted in Canadian dollars, excluding GST
- Proponent must submit an amount greater than zero for each part of the Fee Proposal
- Identify the RFP No. (2026-ASHC-009) in the email subject line when submitting

Compliance Matrix

1. [p.1 · Cover Page] (submission, high)

RFP Closing Date and Time: September 14, 2026 at 2:00:00 p.m. Alberta time.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

2. [p.1 · Cover Page] (submission, high)

Proposal Submission Attention: Procurement Email Address: ASHCProcurement@gov.ab.ca

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

3. [p.1 · Cover Page] (submission, medium)

Submit inquiries by email only to the Inquiries Contact

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

4. [p.1 · Cover Page / Section 2.5.2] (format, medium)

Identify the RFP No. in the email subject line.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

5. [p.6 · Section 1.3.2] (personnel, medium)

The successful Proponent of the RFP process will be required to appoint a project leader who will interface with ASHC's project manager.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

6. [p.7 · Section 2, Article 5.1] (submission, high)

Inquiries regarding this RFP must be emailed to the individual identified as the Inquiries Contact on the cover page of this RFP.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

7. [p.7 · Section 2.5.2] (format, medium)

When submitting inquiries, identify the RFP No. in email subject line.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

8. [p.9 · Section 3, Article 2.1] (format, medium)

Organize the Proposal to clearly and succinctly present the required information in the following format using the exact section titles, numbering, and sequence as specified in this RFP:

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

9. [p.9 · Section 3, Article 2.1.1] (format, medium)

Include a Table of Contents that clearly identifies the sections and page numbers in the Proposal.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

10. [p.10 · Section 3, Article 2.5] (experience, high)

The Proponent must provide a minimum of three (3) references for the proposed resource in Section 5 – Proposal Submission Form.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

11. [p.10 · Section 3, Article 2.2] (submission, high)

Each Proponent must only propose one resource for the role per RFP response.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

12. [p.10 · Section 3, Article 2.3] (submission, high)

ASHC will receive Proposals in electronic PDF documents, which is searchable and unprotected, only through email no later than the RFP Closing Date and Time as indicated on the cover of the RFP.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

13. [p.10 · Section 3, Article 2.6] (format, high)

Submit Proposals as two (2) separate documents in one email as follows:

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

14. [p.10 · Section 3, Article 2.6.1] (format, high)

Package one, RFP Qualifications Submission submitted in PDF version of the entire package, excluding any fee related information.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

15. [p.10 · Section 3, Article 2.6.3] (format, medium)

File size of both Packages of Proposal should not exceed 10 MB.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

16. [p.10 · Section 3, Article 2.7] (format, medium)

Package one, the RFP Qualifications Submission Should be limited to 20 single-sided, 8½" x 11" pages or equivalent (e.g. 11" x 17" sheets for charts, schedules, etc. count as 2 pages).

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

17. [p.10 · Section 3, Article 2.7.2] (format, medium)

Proponents may include additional information which they consider relevant, but the maximum number of pages should not be exceeded.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

18. [p.10 · Section 3, Article 2.7.3] (format, low)

Proponents should use an easy to read font type and size, such as 11 point Arial or 12 point Times-Roman.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

19. [p.10 · Section 3, Article 3.1] (experience, high)

Minimum ten (10) years of progressive experience delivering UX, UI, and Service Design within complex enterprise environments, preferably within government, public sector, or similarly regulated organizations.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

20. [p.11 · Section 3, Article 3.2] (experience, high)

Minimum five (5) years of experience supporting digital transformation initiatives within government, public sector, crown corporations, or comparable environments.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

21. [p.11 · Section 3, Article 3.3] (personnel, high)

Post-secondary diploma or degree in Interaction Design, Human Computer Interaction (HCI), Product Design, User Experience Design, Industrial Design, Graphic Design, Computer Science, or a related discipline.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

22. [p.12 · Section 3, Article 5.1] (experience, medium)

Provide two (2) representative projects demonstrating experience designing enterprise digital products or platforms.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

23. [p.12 · Section 3, Article 6.1] (experience, medium)

Provide two (2) project examples demonstrating experience designing and delivering citizen-facing, partner-facing, and/or internal enterprise digital services.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

24. [p.13 · Section 3, 8.1] (format, high)

Submit the proposed fee as Hourly Rate to a maximum upset fee on the Fee Proposal Submission Form provided in Section 5.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

25. [p.13 · Section 3, 8.1] (submission, high)

Any required information that is omitted or illegible, any alterations to the text, or any conditions added on or submitted with the Fee Submission Form, may cause the Proposal to be declared invalid and rejected.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

26. [p.13 · Section 3, 8.1.1] (financial, high)

Proponent must submit an amount greater than zero for each part of its Fee Proposal.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

27. [p.13 · Section 3, 8.3] (financial, high)

Do not include GST in any Fee Proposal.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

28. [p.14 · Section 3, 8.4] (financial, high)

Submit Fee Proposal in Canadian dollars.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

29. [p.16 · Section 5, Proposal Submission Form] (submission, medium)

ATTENTION: Procurement Alberta Social Housing Corporation Email: ASHCProcurement@gov.ab.ca

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

30. [p.17 · Section 5, 2.3] (submission, high)

Confirms receipt of all addenda issued for the RFP, if any;

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

31. [p.17 · Section 5, 2.4] (submission, high)

Considered those addenda in the preparation of this Proposal;

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

32. [p.19 · Consulting Services RFP Terms and Conditions, 2.1] (submission, medium)

RFP documents are only available through Alberta Purchasing Connection at <https://purchasing.alberta.ca/>

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

33. [p.20 · 16.1.2] (other, medium)

Should the Consultant receive an access request under ATIA, the Consultant shall not respond to it but shall immediately forward the access request to ASHC for further handling.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

34. [p.21 · 6. CONFLICT OF INTEREST .1] (submission, high)

Proponents must fully disclose, in writing to ASHC before the RFP Closing Date and Time, the circumstances of any possible conflict of interest or what could be perceived as a possible conflict of interest if the Proponent were to become a contracting party pursuant to the RFP.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

35. [p.21 · 9. PROPOSAL .1] (submission, high)

A proponent must not submit more than one Proposal.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

36. [p.21 · 10. FEE .1] (format, high)

Submit a fee for the Services in Canadian dollars and exclusive of the Goods and Services Tax and the Harmonized Sales Tax.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

37. [p.21] (other, low)

.2 In event of Fixed Fee any inconsistency between words and numbers, words shall govern.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

38. [p.22 · 13. RFP CLOSING .1] (submission, high)

ASHC will receive Proposals through e-mail and no later than RFP Closing Date and Time as indicated on the cover of the RFP.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

39. [p.22 · 13. RFP CLOSING .2] (submission, high)

Proposals received after the RFP Closing Date and Time will be rejected.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

40. [p.22 · 14. LANGUAGE .1] (format, high)

All Proposals, including attachments, presentation material, other information, resumes, reference letters, etc. must be submitted in English.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

41. [p.22 · 19. PROPOSAL EVALUATION .2] (other, medium)

In the event of any mandatory requirements, Proponents meeting the mandatory requirements identified in the RFP will have their Proposals evaluated further.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

42. [p.23 · 21.3.3] (personnel, high)

representatives of the Proponent's firm, the Proponent's team lead for the project, and key personnel designated by the Proponent, including major subconsultants, will be required to attend.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

43. [p.24 · 27.1] (personnel, high)

If Proponents become aware that any of the Team Members or Key Individuals will be unable or is likely to be unable to participate in Proponent's team, the Proponent must immediately so advise ASHC, and indicate proposed substitute Team Member or Key Individual.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

44. [p.25 · 27.2] (personnel, high)

Failure to do so may result in disqualification of the Proponent from the RFP process or, if ASHC becomes aware of such breach of this provision after the RFP has been issued from the RFP process.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

45. [p.25 · 27.4] (personnel, high)

All information required by this RFP in respect of Team Members and Key Individuals must be provided to ASHC in respect of any proposed substitute Team Members or Key Individuals, as applicable.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

46. [p.25] (other, low)

.1 This RFP shall be governed and interpreted in accordance with the laws in force in Alberta.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

47. [p.25 · 28.1] (certification, medium)

The Proponent shall comply with the provisions of all laws, now in force or in force after the submission of the Proposal, or parts thereof, that expressly or by implication apply to this RFP or resulting Contract, if applicable.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

48. [p.29 · 10. RECORDS AND REPORTING, clause 10.2] (other, medium)

The Consultant shall submit periodic written status report to ASHC as requested by ASHC during the Term indicating: .1 the Services completed during that reporting period; .2 the time schedule for those portions which are not completed; and .3 any other information requested by ASHC in relation to the completion of this Contract.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

49. [p.30 · 12. PERSONNEL REPLACEMENT, clause 12.3] (personnel, high)

Failure to comply with this Article 12 - Personnel Replacement is an act of default.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

50. [p.31 · 14. MATERIAL OWNERSHIP, clause 14.5] (other, medium)

Prior to reproducing or incorporating any third party copyright materials into the Materials, the Consultant must obtain written permission from the copyright holder and provide ASHC with copies of the written permissions that are satisfactory to ASHC.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

51. [p.32] (other, low)

Contract shall be made by the Consultant without the prior written approval of ASHC.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

52. [p.33 · 16.2.1] (certification, medium)

the Consultant shall adhere to POPA and the terms of this Contract in its collection, use and disclosure of any Personal Information

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

53. [p.33 · 16.2.2] (other, medium)

the Consultant shall not collect, use or disclose any Personal Information under this Contract except as reasonably required to fulfill its obligations under this Contract, or as otherwise expressly authorized in writing by ASHC

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

54. [p.33 · 16.2.3] (other, medium)

in providing the Services the Consultant shall make every reasonable effort to ensure that Personal Information that is to be or is actually used to make a decision that directly affects an individual, is both complete and accurate.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

55. [p.33 · 16.4] (other, high)

The Consultant shall store only in Canada all records of Personal Information which are disclosed to the Consultant under this Contract, including records that are collected, used or stored on behalf of ASHC.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

56. [p.34 · 18.1] (insurance, high)

The Consultant shall, at its own expense, and without limiting its liabilities or obligations under this Contract obtain and maintain the following minimum insurance, in accordance with the Alberta Insurance Act

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

57. [p.34 · 18.1.1] (insurance, high)

general liability insurance in an amount not less than \$2,000,000 inclusive per occurrence, insuring against bodily injury, personal injury, and property damage including loss of use thereof.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

58. [p.34 · 18.1.1] (insurance, high)

This insurance shall be endorsed to provide not less than 30 days advance written notice of cancellation to ASHC.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

59. [p.34 · 18.1.2] (insurance, high)

automobile liability insurance on all vehicles owned, licensed in the name of the Consultant and used in the performance of the Services in an amount not less than \$2,000,000.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

60. [p.34 · 18.1.3] (insurance, high)

professional liability insurance, on a claims made basis, in an amount not less than \$1,000,000 per claim, insuring its liability resulting from the performance of the Services under this Contract.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

61. [p.34 · 18.1.3] (insurance, high)

Such insurance is required to remain in place for two years following the completion or termination of this Contract.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

62. [p.34 · 18.2] (insurance, high)

The Consultant shall provide ASHC with acceptable evidence of all required insurance, in the form of a detailed certificate of insurance, prior to commencing the Services and at any other time upon request of ASHC.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

63. [p.34 · 18.2] (insurance, high)

At any time requested by ASHC, the Consultant shall provide certified copies of all required insurance policies.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

64. [p.34] (other, low)

Agreement and shall not operate as a waiver by ASHC of any rights.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

65. [p.34 · 18.3] (insurance, high)

Unless otherwise specified, required insurance coverages shall be maintained continuously for the duration of the Contract.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

66. [p.34 · 18.4] (insurance, high)

The Consultant shall ensure that all its subconsultants obtain and maintain comparable insurance to that set forth in clause 18.1.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

67. [p.36 · 21.4] (other, medium)

Within 14 days of notice of such suspension, the Consultant shall submit to ASHC, a schedule of costs and expenses incurred plus any additional costs the Consultant expects to incur after the date of suspension, and for which the Consultant will request reimbursement.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

68. [p.37 · 24.1] (other, medium)

The Consultant shall ensure that there is not a conflict of interest or an apparent conflict of interest on the part of the Consultant or its employees in relation to the Services, and all Services shall be performed in accordance with high ethical standards.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

69. [p.37 · 24.2] (other, medium)

In the event the Consultant becomes aware of any matter that causes or is likely to cause a conflict of interest in relation to the performance of the Services, the Consultant shall immediately disclose such matter to ASHC in writing.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

70. [p.37 · 24.2] (other, medium)

Upon such disclosure, the Consultant shall not commence or continue performance of the Services without the prior written consent of ASHC.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

71. [p.37] (other, low)

1. This Article shall not apply to Article 22 – Termination.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

72. [p.40] (other, low)

7. This Contract shall be for the benefit of and binds the successors and assigns of the parties.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

73. [p.40 · 30.10] (format, medium)

This Contract may be executed by the parties in counterparts, and may be delivered by electronic transmission in Portable Document Format (PDF), each of which upon execution and delivery shall be deemed an original and all which taken together shall constitute one and the same agreement.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

74. [p.41 · Signature Block] (submission, high)

SIGNED by the person authorized to bind the Consultant.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

75. [p.43 · 3. REPORTING] (other, medium)

The Consultant will be required to provide monthly written status updates.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

76. [p.43 · 4. FACILITIES] (other, medium)

All work must be completed during regular business hours.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐

77. [p.43 · 4. FACILITIES] (other, high)

The Consultant must reside in Canada and ensure all work is performed within the country.

Can we meet this? ☐ Yes ☐ No ☐ Unsure Owner: _____ Evidence attached: ☐