

Mandatory-Criteria Compliance Matrix

Source document: ERP Project Management and Advisory Services

Generated 2026-10-15 04:42 UTC

Go / No-Go Summary

Mandatory requirements found: 61

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

High-risk items:

- p.9 — Proposals must include all relevant fees and other costs associated with the delivery of the Services that are the responsibility of the ...
- p.10 — The proposed individual must hold a current Project Management Professional (PMP), Certified Associate in Project Management (CAPM), or P...
- p.11 — The fee proposal shall clearly identify the proposed hourly rate, estimated monthly cost, and maximum annual cost for the delivery of the...
- p.11 — The fee proposal shall include all costs associated with providing the Services, including professional fees, administrative costs, insur...
- p.11 — The Proponent shall identify the proposed rates for each year of the anticipated three-year Contract term and clearly disclose any propos...
- p.12 — The Proponent shall identify any assumptions or conditions applicable to the fee proposal.
- p.12 — The Proponent shall identify their proposed invoicing structure and payment terms.
- p.12 — All prices shall be quoted in Canadian dollars with GST identified separately.
- p.12 — Submission of a Proposal that complies with the mandatory submission requirements of this RFP.
- p.12 — A minimum of seven (7) years of progressively responsible project management experience, including significant enterprise technology impl...
- p.12 — Demonstrated experience leading ERP replacement projects within Canadian municipalities.
- p.12 — The individual proposed to perform the Services must hold a current Project Management Professional (PMP), Certified Associate in Project...

Submission Envelope

Closing date/time: Friday, October 2, 2026 at 2:00 p.m. Alberta Time

Timezone: Alberta Time (MDT)

Submission channel: Email: financeprocurement@morinville.ca

Page limits: Executive Summary: no more than two pages in length

Addenda: Appendices and any subsequent Addenda are incorporated into and form part of this RFP.

Questions/Clarifications must be submitted in writing by email to financeprocurement@morinville.ca no later than August 26, 2026. Responses to questions/clarifications will be posted to Alberta Purchasing Connection (www.purchasingconnection.ca) on September 16, 2026. Verbal responses to any inquiry are not binding on either party.

Format rules:

- Proposals must be submitted electronically by email
- Cover page must clearly identify: title of RFP, Proponent's name and contact information, and date of submission
- Proposals shall be divided into sections: Executive Summary; Proposal Narrative; Project Approach and Schedule; Proponent Qualifications; Proponent References; Fee Proposal; Other Pertinent Information

- All Proposals shall be submitted in the English language
- Only one Proposal may be submitted by each Proponent
- Proposals must include all relevant fees and other costs associated with delivery of the Services
- All fees shall be quoted in Canadian dollars; GST identified separately
- Executive Summary must be no more than two pages in length
- Proposals must include all required information
- Conflict of interest disclosure must be included in writing on or before the Closing Date
- Proposal must be signed by an individual authorized to legally bind the Proponent
- Proponent must confirm availability to provide Services on a full-time, dedicated basis

Compliance Matrix

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

Proposals shall be submitted electronically to: financeprocurement@morinville.ca

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

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

Responses to this RFP are to be submitted electronically by email.

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

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

Submissions are to be sent to financeprocurement@morinville.ca on or before the closing date and time.

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

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

Late submissions will NOT be considered.

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

5. [p.4 · PART I, Section 3 – Closing Date] (submission, high)

Proposals shall be submitted electronically by email in accordance with the instructions outlined on the cover page.

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

6. [p.4 · PART I, Section 3 – Closing Date] (submission, high)

Proposals will be received up to 2:00:00 p.m. (Alberta Time) on Friday, October 2, 2026 (the "Closing Date").

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

7. [p.4 · 4.9] (other, high)

"Mandatory Requirements" means the minimum requirements that must be addressed or contained in a Proposal as described in this RFP;

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

8. [p.8 · Part III / General Responsibilities] (personnel, high)

Personally perform the Services described in this RFP. Substitution of the assigned Contractor shall not occur without the prior written approval of the Town.

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

9. [p.8 · Part III, Section 1.2] (format, high)

Proposals shall be divided into sections identified as follows: a. Executive Summary; b. Proposal Narrative; c. Project Approach and Schedule; d. Proponent Qualifications; e. Proponent References; f. Fee Proposal; and g. Other Pertinent Information.

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

10. [p.8 · Part III, Section 1.3] (format, high)

All Proposals shall be submitted in the English language.

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

11. [p.9 · Part III, Section 1.5] (financial, high)

Proposals must include all relevant fees and other costs associated with the delivery of the Services that are the responsibility of the Successful Proponent.

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

12. [p.9 · Part III, Section 1.6] (submission, high)

Proposals submitted after the Closing Time will NOT be considered.

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

13. [p.9 · Part III, Section 1.7] (submission, high)

Only one Proposal may be submitted by each Proponent.

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

14. [p.9 · Part III, Section 1.8] (format, high)

Proposals must include all required information.

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

15. [p.9 · Part III, Section 1.9] (submission, high)

Proponents must fully disclose, in writing to the Town on or before the Closing Date of this RFP, 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 this RFP.

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

16. [p.9 · Part III, Section 2.1] (format, medium)

This section should include each of the following items and be no more than two pages in length:

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

17. [p.9 · 3.1 Proposal Narrative] (format, medium)

the Proponent must demonstrate an understanding of the ERP replacement project, the role of the ERP Replacement Project Manager, and the key requirements and challenges associated with successfully delivering the Services.

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

18. [p.9 · 4.1 Project Approach and Schedule] (format, medium)

The Proponent must describe their proposed approach to managing the ERP replacement project and delivering the Services identified in this RFP.

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

19. [p.10 · 4.3 Project Approach and Schedule] (format, high)

The Proponent must provide a proposed high-level project schedule identifying anticipated project phases, key activities, milestones, dependencies, decision points, and estimated time frames.

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

20. [p.10 · 5.1 Proponent Qualifications] (experience, high)

The Proponent must demonstrate the qualifications, experience, and capabilities necessary to successfully provide the Services identified in this RFP.

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

21. [p.10 · 5.1(a) Proponent Qualifications] (experience, high)

a minimum of seven (7) years of progressively responsible project management experience, including managing significant enterprise technology implementation projects and ERP replacement projects within the public sector;

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

22. [p.10 · 5.1(b) Proponent Qualifications] (personnel, high)

a detailed resume for the individual proposed to perform the Services, including relevant education, professional designations, certifications, project management credentials, and change management qualifications.

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

23. [p.10 · 5.1(b) Proponent Qualifications] (certification, high)

The proposed individual must hold a current Project Management Professional (PMP), Certified Associate in Project Management (CAPM), or Projects IN Controlled Environments (PRINCE2) Practitioner certification.

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

24. [p.11 · 5.1(h) Proponent Qualifications] (other, medium)

confirmation of the Proponent's availability to provide the Services throughout the term of the Contract in accordance with the approved project schedule, and the earliest date on which the Proponent would be available to commence the engagement

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

25. [p.11 · 6.1 Proponent References] (experience, high)

The Proponent must provide a minimum of three references from Canadian municipalities or similar public sector organizations for which the individual proposed to perform the Services has provided ERP replacement project management or closely related services within the past ten years.

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

26. [p.11 · 7.1 Fee Proposal] (format, high)

The Proponent shall provide a detailed fee proposal for the Services identified in this RFP using the attached Cost Schedule.

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

27. [p.11 · 7.1 Fee Proposal] (financial, high)

The fee proposal shall clearly identify the proposed hourly rate, estimated monthly cost, and maximum annual cost for the delivery of the Services, together with any other fees or charges associated with the engagement.

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

28. [p.11 · 7.2 Fee Proposal] (financial, high)

The fee proposal shall include all costs associated with providing the Services, including professional fees, administrative costs, insurance, travel time, travel expenses, accommodations, meals, and any other expenses or disbursements required to perform the Services.

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

29. [p.11 · 7.3 Fee Proposal] (financial, high)

The Proponent shall identify the proposed rates for each year of the anticipated three-year Contract term and clearly disclose any proposed rate increases or other pricing adjustments that may apply during the term of the Contract, including the timing and basis of each adjustment.

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

30. [p.12 · 7.4 Fee Proposal] (financial, medium)

The Proponent shall identify any assumptions or conditions applicable to the fee proposal.

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

31. [p.12 · 7.5 Fee Proposal] (financial, medium)

The Proponent shall identify their proposed invoicing structure and payment terms.

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

32. [p.12 · 7.6 Fee Proposal] (financial, high)

All prices shall be quoted in Canadian dollars with GST identified separately.

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

33. [p.12 · 2.1 Mandatory Requirements] (submission, high)

Proposals that do not satisfy all mandatory requirements may be rejected and will not proceed to the rated evaluation stage.

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

34. [p.12 · 2.2 Mandatory Requirements] (submission, high)

Submission of a Proposal that complies with the mandatory submission requirements of this RFP.

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

35. [p.12 · 2.2 Mandatory Requirements] (experience, high)

A minimum of seven (7) years of progressively responsible project management experience, including significant enterprise technology implementation projects within the public sector.

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

36. [p.12 · 2.2 Mandatory Requirements] (experience, high)

Demonstrated experience leading ERP replacement projects within Canadian municipalities.

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

37. [p.12 · 2.2 Mandatory Requirements] (certification, high)

The individual proposed to perform the Services must hold a current Project Management Professional (PMP), Certified Associate in Project Management (CAPM), or Projects IN Controlled Environments (PRINCE2) Practitioner certification.

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

38. [p.12 · 2.2 Mandatory Requirements] (experience, high)

Three references meeting the requirements of this RFP.

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

39. [p.12 · 2.4 Mandatory Requirements] (format, high)

each Proposal shall include all information required by this RFP to enable the Evaluation Committee to assess the Proponent's qualifications, experience, proposed approach, and overall value to the Municipality.

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

40. [p.15 · Part V, 1.1.2] (submission, medium)

Any questions raised by potential Proponents during this stage shall be submitted in writing and must be received by email no later than the Deadline for Questions/Clarifications specified below.

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

41. [p.15 · Part V, 1.1.5] (submission, medium)

Written responses will be required within the time specified by the Municipality.

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

42. [p.16] (other, low)

Proponent must achieve to advance to Stage Three.

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

43. [p.16 · Part V, 1.3.4] (submission, medium)

The Proposals received shall remain open for acceptance for a period of 90 days following the Closing Date in order to allow the Municipality to undertake the evaluation of the Proposals received, to conduct the interviews noted above, and to enter into the ITN;

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

44. [p.18 · Part VI, 5.2] (submission, low)

The Proponent is required to immediately bring forth to the Town any conflict or error that it may find in the RFP.

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

45. [p.19 · Part VI, 5.3] (submission, low)

Proponents are hereby required to satisfy themselves as to the accuracy and/or completeness of the information provided in this RFP.

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

46. [p.19 · Part VI, 7.1] (submission, high)

A Proposal will not be considered is was not prepared independently and without collusion, consultation, communication, or agreement with any other Proponet regarding any matter relating to the Proposal, including pricing.

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

47. [p.19 · Part VI, 8.1] (submission, high)

The failure to comply with any aspect of this RFP (either in a material way or otherwise), including, but not limited to, the instructions to Proponents, shall render the Proponent subject to such actions as may be determined by the Town, including disqualification from the selection process, suspension from the selection process and imposition of conditions which must be complied with before the Proponent will have its privilege of submitting a Proposal reinstated.

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

48. [p.20 · 12.1] (insurance, high)

Commercial General Liability Insurance with a minimum limit of \$2,000,000 per occurrence.

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

49. [p.20 · 12.1] (insurance, high)

Professional Errors and Omissions (Professional Liability) Insurance with a minimum limit of \$2,000,000 per claim.

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

50. [p.20 · 12.1] (certification, high)

Workers' Compensation Board (WCB) coverage, where required by law, or evidence of exemption if applicable.

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

51. [p.20 · 12.2] (insurance, high)

Certificates of insurance satisfactory to the Municipality shall be provided prior to commencement of the Services and upon request throughout the Contract term.

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

52. [p.20 · 1.1(a) (Appendix A)] (submission, medium)

The Proponent has reviewed and understands the RFP and all Addenda issued by the Town.

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

53. [p.20 · 1.1(c) (Appendix A)] (personnel, high)

The Proponent confirms their availability to provide the Services on a full-time, dedicated basis in accordance with the requirements of the RFP.

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

54. [p.20 · 1.1(d) (Appendix A)] (personnel, high)

The Proponent confirms that the individual identified in the Proposal to perform the Services will personally perform the Services and will not be substituted without the prior written approval of the Town.

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

55. [p.20 · 1.1(e) (Appendix A)] (financial, medium)

The Proponent confirms that the fees identified in the Cost Schedule include all costs associated with providing the Services, except GST, unless otherwise expressly identified in the Proposal.

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

56. [p.20 · 1.1(f) (Appendix A)] (financial, medium)

The Proponent confirms that all proposed rates and any future rate increases or pricing adjustments applicable during the three-year Contract term have been fully disclosed in the Proposal and Cost Schedule.

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

57. [p.20 · 1.1(g) (Appendix A)] (submission, high)

The Proponent acknowledges that the Proposal shall remain open for acceptance for a period of 90 days following the Closing Date.

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

58. [p.20 · 1.1(h) (Appendix A)] (submission, medium)

The Proponent has disclosed below any actual, potential, or perceived conflict of interest related to the Proponent's participation in this RFP or performance of the Services.

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

59. [p.22 · 4.1 (Appendix A)] (submission, high)

The Proposal must be signed by an individual authorized to legally bind the Proponent.

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

60. [p.23 · 1.1 (Appendix B)] (financial, high)

All fees shall be quoted in Canadian dollars and shall include all costs associated with providing the Services, including professional fees, administrative costs, insurance, travel time, travel expenses, accommodations, meals, and any other expenses or disbursements required to perform the Services.

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

61. [p.23 · 1.1 (Appendix B)] (format, high)

GST shall be identified separately.

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