

Canadian
Breast Cancer
Foundation

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cancer du sein



Canadian Breast Cancer Foundation

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Toronto, ON M5G 2J5
Canada

**Request for Proposal:
Online Event Management System**

April 30th, 2013

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1. Purpose

The purpose of this Request for Proposal (RFP) is to identify the vendor and software solution best suited to the Foundation's current and future business needs and to provide a transparent and accountable process for vendors to demonstrate their capabilities with respect to those needs.

Invite prospective vendors to submit a proposal for an Online Events Management System (EMS). The EMS would allow for the creation and support of online events, donations, receipting, reporting as well as serve as our primary online e-communications platform for our event communications. This system would serve the Canadian Breast Cancer Foundation (CBCF)'s 3rd party events as well as the CBCF's signature event, the CIBC Run for the Cure online platform.

Preference will be given to vendors who have demonstrated a clear understanding of the Foundations requirements, overcome technical challenges presented by the requirements, and have a proven track record designing, implementing, and supporting proposed solutions. CBCF is seeking a vendor capable of providing a comprehensive, cost-effective solution based on all of the requirements encompassed within this RFP, a solution with a well-defined architecture, and a solution that includes a comprehensive plan for continuing service and support. The provided solution is required to meet the current and future business needs for the CBCF.

2. RFP Timetable

Date	Deadline (EST)	Activity	Action
04/30/13		Circulate RFP to prospective vendors	Email directed vendors, submit RFP to Merx to be posted
05/15/13	5:00pm	Vendor responses due	
06/07/13	5:00pm	Identify and notify finalists	Short listed vendors will be advised and invited to present at CBCF Central office
06/10/13 - 06/14/13		Vendor presentations	Short listed vendor to present at CBCF Central office
06/24/13		Award contract to winning vendor	
06/25/13		Debrief Unsuccessful Vendors	
06/25/13 - 06/27/13		Negotiate contract	

3. Background

The Canadian Breast Cancer Foundation is the leading community-driven organization in Canada dedicated to creating a future without breast cancer. Our investments in innovative and relevant research and education have led to progress in breast cancer prevention, diagnosis, treatment and care. The Foundation provides financial support in the form of community-based initiatives and grants to scientific and medical research aimed at advancing the prevention and treatment of breast cancer.

Since 1986, the Foundation has been at the forefront of a nationwide movement supporting and advocating for the breast cancer community. To date the Foundation has allocated over \$274 million towards breast cancer research, health promotion, advocacy, education and awareness programs. In 2012 alone, the Foundation allocated over \$26.5 million towards cause related work, of which \$19.8 million was allocated towards breast cancer research grants across the country.

At an operational level, the Foundation carries out its work across Canada through the efforts of its five business units and their staff and volunteer resources: four regional offices in Atlantic Canada, Ontario, Prairies/NWT and BC/Yukon, and one Central Office in Toronto. Each of the five business units of the Foundation has defined roles and responsibilities within a shared-services organizational structure, maximizing operational efficiencies and delivery of consistent nation-wide messaging.

The Canadian Breast Cancer Foundation CIBC Run for the Cure is Canada's largest single day, volunteer-led fundraising event dedicated to raising funds for breast cancer research, education and awareness programs. It was founded by a small group of volunteers who wanted to raise awareness and funds for the breast cancer cause. The CIBC Run for the Cure has made great strides since then, while staying true to grassroots and our volunteer founders' vision.

Last year, Canadians united to raise \$30 million in the 2012 Canadian Breast Cancer Foundation CIBC Run for the Cure. A further \$3 million was raised through 3rd party events from across the country.

4. Time of Completion

The vendor must have secured commitments to implement the provided solution prior to March 1st 2014.

5. Time of Contract

Any contract awarded pursuant to this RFP solicitation shall be for a contract period up to 36 months, with the possibility of an extension.

6. Requirements, Specifications, Scope

The Foundation has defined current functional and non-functional requirements and specifications for the event management system which are outlined below. Please note that the requirements and specifications are not limited to the list provided below and vendors who are invited to proceed to the short list will be provided with more detailed Business Requirements at that time. Vendors are still invited to submit their RFP proposal if they do not meet all of the requirements and specifications outlined below; suitability of the proposal will be determined by Foundation Management during the evaluation stage of the RFP process.

As part of the RFP submission package, vendors must complete Form B: Requirements and Specifications Checklist, which can be found at the end of this document. The requirements and specification listed in section 6.0 of the RFP document and the items found on the Form B checklist are identical. Requirements and specifications of the offline data entry services include, but are not limited to:

Functional Requirements

Business Requirement

- Supports online event management including event creation, event registration, online donations, tax receipting, ecommerce, & activity reporting
- Social media integration (Twitter, Facebook...)
- Online participant fundraising tools
- Integrated email system that supports html message creation and constituent database integration
- Is bilingual at all levels (registrations, donations web pages, participant centre...)
- Ability to enter batches of offline donations and registrations
- Must be PCI Compliant (have an attestation of compliance for service providers)
- Must conform to CRA guidelines
- Ability to import legacy data
- All aspects of the system will have the ability for customization, both by software experts and/or trained staff
- Allows administrators to define and assign different user levels with variable levels of access to the system (role based security)

Tracking and Reporting

- Ability to import/export files and reports to/from Microsoft Office (minimum version 2007)
- Ability to export data from the proposed system to CBCF CRM system (Raisers Edge) and/or financial software system (Great Plains)
- Administrator and User dashboards
- Ability to generate reports
- Ability to build custom reports
- Creates audit trail of every action taken on a submission/project

Non Functional Requirements

Technical Requirement

- Cloud based solution (SaaS)
- Ability to handle up to 5000 concurrent online users
- Ability to scale to meet increased demand without downtime
- Support of all major Web browsers for both PC/Windows and Apple Mac platforms
- Support integration with existing fundraising CRM (Raisers Edge) and financial services software (Great Plains) via web services or application programming interface (API)
- Secure access using at minimum SSL/HTTPS to access application and web services
- Monitoring and alerting capability to support 99.9% uptime and two (2) hour recovery time
- Backup of CBCF data, archive of data to be kept for 7 years
- Test environment to mirror production

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Operations and Support

- Provide 24/7/365 technical and end-user web-based and telephone support
- Appropriate notification to Customer for all scheduled maintenance
- Meeting response times associated with service related incidents
- Dedicated account manager, internal project management, development and technical resources
- Provide training and detailed software, database and process manuals, including interface guides and database schemas
- Provide customer support with comprehensive training and detailed software and database manuals, including interface guides and database schemas
- Appropriate communications for all scheduled maintenance and changes

7. Process

This section outlines the general conditions under which the RFP Vendor Proposal shall be made as well as instructions on how to prepare and submit the official proposal to the Foundation. Provisions of this RFP and the contents of the successful responses are considered available for inclusion in final contractual obligations.

Vendors who wish to submit a proposal in response to this RFP should do so according to the following schedule. Vendors who do not conform to this schedule will be disqualified. All times are in Eastern Standard Time (EST).

This is an open and competitive process. The process and timelines will be undertaken as follows. All contracts are subject to review by the Foundation legal counsel, and the project will be awarded upon signing of an agreement or contract, which outlines terms, scope, budget and other necessary items.

Date	Time (EST)	Activity	Action
05/08/13	5:00pm	Bid / No-Bid Notice	email to mroy@cbcf.org
05/15/13	5:00pm	Vendor Proposal Submission	Letter of solicitation
06/10/13 - 06/14/13		Detailed Presentations	Onsite presentation
TBD		Reference Site Visits	

7.1. Bid / No-Bid Notice

Bidders are requested to acknowledge receipt of this RFP and their intent to “Bid or No Bid” by **11:00 am EST on May 08, 2013 by submitting Form A** which is provided at the end of this document. Responses must be delivered by e-mail submissions to mroy@cbcf.org. Only bidders responding with intent to “Bid” will be eligible to continue in the process.

7.2. Vendor Proposal Submission

For ease of review and to facilitate evaluation, the proposals for this project should be organized according to the Table of Contents below. Include all information listed in the order defined below and in the sequence indicated.

Vendor Proposal Submission Content Overview

Cover Page: Name of the company and project title

Table of Contents (tabbed and indexed in this order, tabs only needed for numbered categories):

1. Letter of Solicitation/Executive Summary

2. Company Information

- a. Contact information
- b. Organizational Information
- c. Qualifications and Experience

3. Specifications and Requirements

- a. Form B-Requirements and Specifications Checklist

4. Project Implementation and Scope of Work

- a. Project Implementation Plan and Timelines
- b. Project Team Members
- c. Subcontractors (if any)

5. Description of Support and Service

- a. Maintenance Plan
- b. User Training
- c. Documentation
- d. Support Services
- e. Customer Service

6. Quote/Cost Estimate

7. Additional Information

Vendor Proposal Submission Contents Explained

1. Letter of solicitation/executive summary

Explain why the software solution and services offered by your company are the best option for the Foundation. This section must identify the recommended software solution and provide an explanation of why it is suited to the Foundation's needs with specific and explicit reference to the business needs outlined in this RFP. This section should also detail why your company is suited to be the provider of choice for the Foundation, with specific reference to experience, expertise, and the culture and values of the organization.

2. Company Information

a) **Contact information**

- Name
- Title
- Contact information of person authorized to execute the proposal contract and enter into agreements on behalf of the company.
- (If two or more companies are involved in a joint venture or association, the proposal must clearly delineate the respective areas of authority and responsibility of each party.)

b) **Organizational Information**

- Provide specific information concerning the company including, organization's full legal name and address and identify parent company if the company is a subsidiary.

c) **Qualifications and Experience**

- Provide specific information in this section concerning the company's experience in the services specified in this RFP. Relevant information includes: total number of years the company has been in operation, general scope of services provided, and current principal area of expertise.

3. Specifications and Requirements (Include Form B-Requirements and Specifications Checklist)

- Complete *Form B-Requirements and Specification Checklist* to identify key features of EMS

4. Project Implementation and Scope of Work

a) **Project Implementation and Timelines**

- The proposal should include a detailed project implementation plan, including specific tasks, who performs those tasks (e.g. Foundation, Vendor, etc.), and a timeline for project completion

b) **Project Team Members**

- Identify the lead consultant and provide a breakdown of qualification for each member of the project team including:
 - Name
 - Role & Responsibility
 - Location
 - Estimated amount of time each resource will be dedicated to the project
 - Resume , length and type of experience

c) **Subcontractors**

- Identify all subcontractors intend to be used for the proposed scope of work.
- For each subcontractor listed, indicate:
- What products and/or services are to be supplied by that subcontractor and,
 - What percentage of the overall scope of work that subcontractor will perform.

5. Description of Support and Service

(Include Vendor Service Level Agreement as Attachment)

a) **Maintenance Plan**

- Explain how your provided solution and your team will support the Foundation
- Explain your organization's Escalation Procedures
- Describe the maintenance process

b) **User Training**

- Describe or provide examples of education/training offerings and program structure for User Education, technical/support education, etc.

c) **Documentation**

- Describe or provide comprehensive user and system documentation available for the software application.

d) **Customer Services**

- Please describe your company's ability to address customer service.

6. Quote/Cost Estimate

- The price quoted should be inclusive. If your price excludes certain fees or charges, provide a detailed list of excluded fees with a complete explanation of the nature of those fees.
- The proposal shall clearly state all of the costs associated with the project, broken down by category of products and services, and all on-going costs for recommended/required products/services such as maintenance. Provide all fixed fees that are available. If some fees will be based on a time and materials-based payment model, include information listing the hourly rates by name and title for each key personnel proposed by role and title. Cost proposal should reflect the total cost over the full term of the contract. The project costs should include all expenses that will be charged to the Foundation including, but not limited to:
 - Costs for professional services, broken down by hours and rates for each type of service (e.g. Project Management, Installation/Set-up, Configuration, Custom Report Writing, Interfaces, Customizations, etc.)
 - Equipment
 - Initial implementation
 - Training
 - Software Maintenance and Support (including Helpdesk support and software upgrades & bug fixes)
 - Licensing fees, including an explanation on the type of software licensing being proposed (e.g. subscription-based, server-based, named-user, concurrent-user, processor-based, etc.)
 - Shipping
 - Communications
 - Documentation reproduction
 - Travel and Expenses
 - Taxes
 - Other support fees

7. Additional Information

Vendor Proposal Submission Deliverables

Bidders shall deliver the following components to ensure a complete RFP Vendor Submission is received:

- Electronic version of the complete **Vendor Proposal Submission** in Adobe .PDF format and one (1) unlocked electronic version in Microsoft Word format, including this RFP document and the bid price information. Clearly labeled as the **"Complete Vendor Proposal Submission Package"**; provided on either CD, via SFTP, USB...
- 4 Hard copies of documents
- One (1) email version of the complete **RFP Vendor Proposal Submission** sent to : **mroy@cbcf.org**

Note: All information in the Vendor Proposal Submission must match in both electronic and hard copy versions. In cases where they do not match, the Electronic version provided will take precedence.

The Foundation invites bidders to submit a detailed **Vendor Proposal Submission** addressed to:

Canadian Breast Cancer Foundation
Attn: Marc Roy
375 University Avenue, Suite 301
Toronto, ON M5G 2J5
Canada

Vendor Proposal Submissions must be received on, or before **05/15/13**. No amendment or change to proposals will be accepted after the closing time and date.

Participation in this process, including submission of a proposal, shall not give rise to any liability, contractual or otherwise, on the part of the Foundation. The Foundation reserves the right to negotiate price and terms with one or more bidders and no legal obligations will be established until the parties have executed a binding written contract.

7.3. Detailed Presentations

Based on a thorough review of the brief proposals, the Foundation will extend invitations to a short list of prospective vendors to prepare a detailed presentation and demonstration of their software solution and proposed project implementation plan. Presentations will be made in person at the Foundation's Central Office in downtown Toronto. Details on content to be covered in the detailed presentations will be provided as part of the invitation to short list candidates.

7.4. Reference Site Visits

In addition to providing an in-person detailed presentation, short list vendors will be asked to arrange for a small number of Foundation staff members to conduct a site visit and in person reference check at a current client site. Site visits will be conducted following the detailed presentation phase and will provide the Foundation with an opportunity to view the recommended solution in action.

8. Consideration of Proposal

The Foundation reserves the right to accept or reject any and all proposals, to waive any and all formalities and technicalities, and to accept the offer considered to be in the best interest of the Foundation.

The Foundation also reserves the right to reject the proposal of any bidder who previously failed to perform properly, or completely, or complete on time, agreements of similar nature, or to reject the proposal from any respondent who is not in a position to perform specified requirements contained herein.

9. Proposal Evaluation Criteria

The Foundation will be ranking all submissions (Long List) based on the criteria outlined in the table below. A short list of 5 vendors will then be selected to proceed to the Oral Presentation and Client Site Visit stages of the RFP process. A final decision on vendor

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selection will be made based on the cumulative scores for short-list vendors that successfully complete all stages of the RFP process. (See description above in the Full Vendor Proposal Submission Contents Explained section 7.0)

Vendor Proposal Submission (Long List)
1. Alignment with identified Requirements, Specifications, Scope - Functional
2. Alignment with identified Requirements, Specifications, Scope - Non Functional
3. Estimated costs
4. Project Implementation Plan
5. Company Information
Detailed Presentations (Short List)
1. Overall presentation
2. Technical Expertise of vendor project team
3. Detailed alignment with business needs regarding front end user experience
4. Detailed alignment with information technology business needs
5. Detailed alignment with tracking and reporting, search and sorting business needs
6. Implementation project plan and project management details, including risk identification and mitigation
7. Service levels, business practices and client support
8. Detailed cost breakdown
Reference Site Visits (Short List)
1. Client Satisfaction Rating
2. Relevance of the Reference to the identified CBCF Business Needs
3. Ability for vendor to customize/problem solve/trouble shoot based upon Client Requests
4. Ability for Vendor to provide client with agreed upon Terms of Service and Contract Provisions

10. Disclosures/Restrictions on Vendors

In addition to the other information and representations made, each vendor must declare whether it has an actual or potential Conflict of Interest.

If, at the sole and absolute discretion of the Foundation, the vendor is found to be in a Conflict of Interest, Foundation may, in addition to any other remedies available at law or in equity, disqualify the proposal.

The Vendor, by the provision of a Proposal in response to this RFP, warrants that to its best knowledge and belief no actual or potential Conflict of Interest exists with respect to the Proposal or performance of any resulting contract other than those disclosed in the Form of Offer. Where the Foundation discovers a Vendor's failure to disclose all actual or potential Conflicts of Interest, the Foundation may disqualify the Vendor, cancel or terminate any contract awarded to that Vendor pursuant to the RFP process.

11. Right to Award

The Foundation reserves the right to accept or reject any or all bids, make more than one award, or to make no award, in the best interests of the Foundation and the project. Any contract awarded pursuant to this RFP will incorporate the requirements and specifications contained in the RFP, as well the contents of the bidder's proposal as accepted by the Foundation.

12. Proposal Preparation Costs

All costs incurred in the preparation and submission of proposals and related documentation, including bidder presentations and site visits if any, will be borne by the bidder.

13. Confidentiality

Information contained in this RFP, or information obtained by a Respondent in further discussions with CBCF, either in writing, verbally or through observation, is confidential and must not be disclosed by a Respondent except as authorized in this RFP or by CBCF in writing. If any portion of a Respondent's proposal is to be held confidential, such provisions must be identified in the proposal.

Appendices

**Form A - Notice to Bid or Decline
Canadian Breast Cancer Foundation**

RFP Response Form

Submission Deadline: 05/15/13

Submit via email: mroy@cbcf.org

Legal Business Name: _____

Mailing Address: _____

Phone Number: _____

Web Site: _____

E-mail: _____

Fax number: _____

I certify that with regard to the Request for Proposals (RFP) for Online Event Management System issued by the Canadian Breast Cancer Foundation:

___ I have read the RFP.

___ I am entitled to represent the above named company.

___ The Business identified above intends to respond to this RFP by the specified due date and agrees to abide by the proposal conditions referenced throughout the RFP document.

___ The Business identified above declines to respond to this RFP and confirms that the RFP and all associated materials have been destroyed. The Foundation would welcome any explanation of why no response is planned.

Authorized Representative Name (Print): _____

Authorized Representative Signature: _____

Date: _____

Form B - Requirements and Specifications Checklist
Canadian Breast Cancer Foundation

Vendor Name: _____

Requirement & Specifications - (Please mark with an X as appropriate, and if future version, please list expected release date.)

Requirements & Specifications	IN CURRENT VERSION	IN A FUTURE VERSION	AS A CUSTOM ENHANCEMENT	NOT SUPPORTED
Functional Requirements				
<u>Business Requirement</u>				
Supports online event management including event creation, event registration, online donations, tax receipting, ecommerce, & activity reporting				
Social media integration (Twitter, Facebook...)				
Online participant fundraising tools				
Integrated email system that supports html message creation and constituent database integration				
Is bilingual at all levels (registrations, donations web pages, participant centre...)				
Ability to enter batches of offline donations and registrations				
Must be PCI Compliant (have an attestation of compliance for service providers)				
Must conform to CRA guidelines				
Ability to import legacy data				
All aspects of the system will have the ability for customization, both by software experts and/or trained staff				
Allows administrators to define and assign different user levels with variable levels of access to the system (role based security)				
<u>Tracking and Reporting</u>				
Ability to import/export files and reports to/from Microsoft Office (minimum version 2007)				
Ability to export data from the proposed system to CBCF CRM system and/or financial software system				
Administrator and User dashboards				
Ability to generate reports				
Ability to build custom reports				
Creates audit trail of every action taken on a submission/project				
Non Functional Requirements				
<u>Technical Requirement</u>				
Cloud based solution (SaaS)				
Ability to handle up to 5000 concurrent online users				
Ability to scale to meet increased demand without downtime				
Support of all major Web browsers for both PC/Windows and Apple Mac platforms				
Support integration with existing fundraising CRM (Raisers Edge) and financial services software (Great Plains) via web services or application programming interface (API)				

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Secure access using at minimum SSL/HTTPS to access application and web services				
Monitoring and alerting capability to support 99.9% uptime and two (2) hour recovery time				
Backup of CBCF data, archive of data to be kept for 7 years				
Test environment to mirror production				
Operations and Support				
Provide 24/7/365 technical and end-user web-based and telephone support				
Appropriate notification to Customer for all scheduled maintenance				
Meeting response times associated with service related incidents				
Dedicated account manager, internal project management, development and technical resources				
Provide training and detailed software, database and process manuals, including interface guides and database schemas				
Provide customer support with comprehensive training and detailed software and database manuals, including interface guides and database schemas				
Appropriate communications for all scheduled maintenance and changes				