REQUEST FOR PROPOSAL (RFP)

Grantmaking & Grant/Relationship Management Software

Ref: 22085

RFP Closing Date: **July 5th, 2022** @ 11:59PM MST

Prior to proposal submission, please submit a notice of intent to CHF with your intention to apply to this RFP by June 27, 2022. Notice can be found here: **Notice of Intent**

Response Submission Contact: Vafa Adib, Director, Technology
Calgary Homeless Foundation

Tel: 587.327.2087

Email: funding@calgaryhomeless.com

Notice: _By accepting to take part in this proposal process you agree to keep in confidence all information imparted to you in relation with the proposal process, not to disclose it to third parties and not to use it for any other purpose than for the Proposal._

Table of Contents

1.0   INTRODUCTION

Working with homeless-serving agencies and community partners, Calgary Homeless Foundation guides the fight against homelessness in Calgary. Utilizing a three-pronged approach we:

- **Allocate resources for the highest impact and outcomes** to efficiently deliver and maximize benefits to people experiencing homelessness.
- **Build knowledge and understanding** of homelessness through our cutting-edge database and research.
- **Galvanize public and political will** to ensure people have the right housing at the right time.

This approach ensures we help Calgarians journey out of homelessness into a home with the support they need to thrive. Through agile system coordination aligned with research and data, we find innovative and evidence-based supportive housing solutions for people at risk of or experiencing homelessness. Our approach ensures that our city's resources are allocated cost-effectively to provide a full spectrum of services, solutions, and homes for all Calgarians.

CHF responsibly stewards and allocates funding from the Provincial and Federal Governments to agencies and their support programs/services to maximize efficiency and benefits to clients. Funds are allocated through ongoing and one-time grants to programs and services that best address the community's needs in a fiscally responsible way. Funding is awarded based on the quality of proposals received, the need in the community (derived from data and community feedback), and the overall contribution to Calgary's Homeless-Serving System of Care (the "**HSSC**"). Grounded in evidence-based research and data analysis, CHF strives to maximize program participant and fiscal impact.

2.0   OPPORTUNITY INFORMATION/GOAL

Calgary Homeless Foundation (the "CHF") is currently conducting a selection process with the objective of selecting a software vendor (the "Service Provider") to provide, support, and implement a grantmaking and grant/relationship management software solution here at CHF.

This RFP issued by CHF is an invitation to interested parties (an organization/corporation/legal entity) with the ability to enter into legally binding contracts (the "Proponent"), to submit a proposal (the "Proposal") for the provision of the services and scope of work outlined in this RFP. No agreement or contract for services is formed by responding to this RFP until a fully signed, mutually agreed upon contract (the "Agreement") is completed. A Proposal submitted through this opportunity is not irrevocable. CHF is not bound to enter into an Agreement with any Proponent who submits a Proposal.

3.0   BACKGROUND

Given CHF's purpose and ambitions, alongside our strong track record of supporting the development of a robust HSSC here in Calgary, CHF has grown to become one of the largest human services funders in Calgary by dollar amount (2021 community disbursements of approximately $75+ million). In this capacity, CHF is tasked with allocating significant resources in the community to maximize impact and outcomes, utilizing

evaluation, information sharing, and data, all in a timely and accurate manner to guide the fight against homelessness.

Unlike other charitable community foundations, CHF receives funding primarily from government, with the explicit goal of directing this funding to the most effective solutions in the community for addressing homelessness. This is an important distinction: CHF's primary focus is not on managing the funding we receive, but rather on the funding we allocate to the community.

Currently the grantmaking/procurement, contracting lifecycle, and relationship management processes (from drafting, execution and management) are fully manual, complex and resource intensive. Documents, proposals, and evaluations are completed primarily through Microsoft suite tools, while files and other electronic records are managed through SharePoint, email, and through our website. While this existing process and the related workflow have been developed and utilized over the past decade (serving sufficiently so far), CHF is seeking to modernize and enhance its capacity to issue and manage grants/disbursements and manage relationships with recipients efficiently and effectively into the future. Some factors that CHF has identified that further emphasize this need include:

- the increasing rise of collaborative remote work which rely on quick and easy access to data and information
- CHF's extensive (and growing) annual strategic investments from multiple donor streams
- CHF's intent on developing a more integrated and responsive system of care – reporting, outcomes tracking, etc.
- CHF's need on coordinating data sets between grant requirements, impact evaluationand our parallel homeless management information system (HMIS)
- minimizing workload and administration for both internal and external agency partner staff

As a result of these needs, there is a clear value proposition for a software system to enhance this process, thereby ensuring both internal and external stakeholders can be better served today and into the future.

4.0   SCOPE OF WORK

CHF is a funder of impact and outcomes. As such, CHF supports agencies and programs within the HSSC through grant funding via contracts/grant agreements.   CHF manages these grants throughout their life cycle which includes the following high-level processes:

Grantmaking - development, launch, evaluation, award

CHF identifies agency partners through competitive, open and transparent grant/procurement processes. CHF plans, drafts, and posts funding opportunities on our funding webpage, and collects and evaluates applications.

Grant Issuance - contract templates, signatures/execution, payments, amendments

Once identified and awarded, CHF issues grant/funding agreements that contain the main objectives and services provided by the agency partner. In addition, CHF issues grant funding on a upfront or monthly cycle.

Program/relationship Management - qualitative/quantitative data reporting, impact evaluation

During the duration of the grant, CHF actively manages progaram performance and engages in learning-focused evaluation.

Through this RFP, CHF intends to acquire a software solution that can support and enhance all aspects of this process. A more fulsome breakout of this workflow can be found in appendix B of this RFP.

Key Objectives of Software

In addition to enhancing the grant life-cycle process above, this software solution should address the following functional and service objectives:

Functional

- utilize a modern user interface that is intuitive and easy to use for all stakeholders (internal & external)
- reduce/minimize workload & increase productivity and efficiency – automation (reminders, approvals, etc.), minimal button clicks, streamlined workflows, adaptable for need
- CRM functionality such as maintain/contain common data elements for management, reporting & linking to other data systems – contact information, communications tracking, grantee names, usernames, funding amounts, dates, accountabilities, outcomes, etc.
- easily accessible and manageable remotely – internal & external user access for reviews, updates etc.
- audit trails to support compliance/accountabilities – ability to track changes made
- provide an agency portal for organizations partnered with CHF, the ability to access documents/processes/information relevant to them
- provide streamlined and easily customizable proposal/grant review processes – customize rating criteria, side-by-side viewing of proposals/scoring, etc.
- contain custom reporting functions that help CHF analyse complex data sets – dashboards, analytics, etc.
- connection to other software solutions seamlessly through integration tools– connections to Microsoft ecosystem and DocuSign for example

- maintain and generate document templates for easy contract/grant agreement generation – the ability to sign and execute agreements within the system would be ideal
- document storage capability – upload/download/sharing
- have universal search functionality - to allow ease in finding relevant information
- possess ability for budgeting and finance – funds tracking, payments tracking, etc.
- support multi-stage procurement/grantmaking processes
- track multiple funding sources
- support historical data – inputting previous data for record keeping
- easily customizable without significant training or need for customization by software provider

Service
- have readily accessible supports available from software partner if required – help desk, training, updates, etc.
- ease of implementation and adoption of software into organization/current process – support from software provider throughout this process
- data migration supports
- software user community available

Provided these objectives above, Proponents should identify/demonstrate and provide a clear description of how their proposed software solution meets these needs outlined in this RFP. While this list of objectives has been identified by CHF as ideal, they are not expansive, and CHF is open to additional or equivalent alternative solutions. CHF will evaluate each software solution on its overall ability to meet and align with CHF's needs and funding strategy.

5.0   OPPORTUNITY & TECHNICAL REQUIREMENTS

To be eligible for this opportunity, Proponents and their software solutions **must** possess the following:

- Due to privacy legislation, data hosting must be located in Canada
- Have demonstrated experience supporting/implementing this software at similar type/sized organizations in Canada

While all responses to the RFP will be considered, preference will be made for solutions that meet the following technical criteria:

- Cloud based hosting
- Recovery planning
- Service -Level Agreement (SLA) regarding business continuity, costumer service and support, upgrades and updates
- Multi-layer access (e.g. admin, viewer, evaluator, grantee, individuals, etc.)
- Customizable labeling for data entities and online forms
- Custom link or sub-domain containing CHF or Calgary Homeless (e.g. grants.calgaryhomeless.com, etc.)
- Secure authentication and authorization, prefer SAMLE or Single Sign-On plug in
- Supporting conditional questionnaire setup ("if-then" questions)
- Intelligence Reporting capability (preferably Power BI)
- Data extract functionality

- Capable of communicate with other enterprise level applications using connectors or any reliable API (Application Programming Interface) function, both ways (receive and send data) (e.g. raw data extract and export to SQL server hosted data warehouse, accounting apps, etc.)
- Audit reporting and users' logs
- Mobile (browsers) friendly
- Customizable interface to support agency branding (logo, colours, etc.)
- Support KPI (Key Performance Indicators)

Mandatory Minimum Requirements

Proponents must meet the following requirements in order for the application to be qualified:

	Requirement
M1	Application submitted prior to RFP deadline date
M2	Data hosting on Canadian servers
M3	Experience with Canadian non-for-profit organizations similar in scale and scope as CHF
M4	Declaration, including Conflict of Interest declaration, has been completed and signed by the Proponent
M5	RFP Proposal fully complete in accordance with the instructions
M6	No history of non-performance of contract with CHF

Interested Proponents responding to this RFP through its written Proposal will need to describe their approach to delivering the Services outlined in the Scope of Work, demonstrating an appreciation of the key issues and technical requirements for achieving the objectives, meet the minimum mandatory requirements, and having an appropriate methodology and work plan for delivering the Services in the specified timeframes.

6.0   BUDGET

While CHF has an identified internal budget set aside for this project, CHF is not providing a prescriptive budget at this time to prevent limiting the design possibilities in RFP responses. Proponents should provide a detailed list of costs associated with their software solution. CHF will consider the value for dollar in its evaluative criteria.

7.0   NOTIFICATION OF INTENT TO APPLY

Proponents interested in this RFP are asked to submit a Notification of Intent to CHF by June 16, 2022, prior to full Proposal submission. This will help CHF identify potential Proponents for this opportunity. Once we receive your notification, we will be able to inform you of any updates or changes to the RFP process. CHF may also contact Proponents prior to proposal submission to clarify their intention and Proposal.

Please click here to access: Notice of Intent

8.0   PROCESS

Proponents interested in submitting a proposal must complete the RFP proposal form and signed declaration and shall submit via email to the RFP Submission email: funding@calgaryhomeless.com, in PDF format.

To be accepted, proposals must be received by no later than the Closing Date and Time. Proposals received after the Closing Date and Time will not be accepted.

CHF has the right to reject any and all proposals at its sole discretion. Should you have any questions about this opportunity, its requirements, deliveries or regarding the proposal requirements, please utilize the Contact noted above for clarification prior to submitting Proposal. You are reminded that your Proposal should be inclusive of all taxes, fees, and permits, where applicable.

Proposals will be reviewed to determine which is most advantageous to the CHF, guided by the Scope of Work outlined above. Selected proposals moving forward in this RFP process will be shortlisted, and may be invited to present to the CHF, see Presentations below.

Included in this RFP toolkit are the following documents:

- RFP
- Appendix A: Declaration Forms
- Appendix B: Workflow Outline

9.0   WRITTEN PROPOSALS

Interested Proponents must utilize the RFP Proposal Response Form (attached separately) and must address the Scope of Work and Opportunity Requirements as outlined in this RFP.

Proposal Elements

Please clearly describe the following elements in your proposals:

a. Organizational Experience and Capacity
Please discuss your organization's experience providing similar solutions/services to similar type organizations in Canada. References should be provided.

b. Software Solution
Please describe how your solution addresses the scope of work indicated above including service provision and functional objectives.

c. Technical Requirements
Please describe how your solution addresses the technical requirements indicated above.

d. Pricing
Please provide all relevant details regarding the costs/fees associated with your software solution, including any additional life-cycle costs (setup, training, data migration, maintenance, updates, user fees, etc.)

CHF uses a standardized Proposal Response Form to streamline the application and review process. Proposal responses should be concise but thorough and ensure that each section is answered in its entirety. Attachments may be considered but only if they are relevant to the RFP or demonstrate previous related work and experience.

The completed Proposal and signed declaration should be in PDF format. Proponents acknowledge that submitted Proposals will be open for acceptance by CHF for at least 90 days after the Closing Date.

10.0   PRESENTATIONS / INTERVIEW / SOFTWARE DEMO

Along with providing a written proposal, Proponents that are shortlisted will be requested to provide a presentation and demonstration of their software solution, either in person or via teleconference (MS Teams) as per the RFP Schedule below. Proponents should prepare a presentation/demonstration customized for CHF, that provides an overview of their Proposal, highlighting and showcasing aspects of their proposed software to the RFP Panel. The duration of each demonstration will be no longer than 60 minutes, including follow-up questions and answers from both parties.

11.0   QUESTIONS/QUERIES

Should Proponents have any questions about this opportunity, its requirements, deliveries, or regarding the response requirements, please contact contracts@calgaryhomeless.com for clarification prior to submitting a proposal. CHF will strive to answer all questions with respect to this RFP, and where appropriate, to ensure a fair and transparent process, any relevant questions or answers that would be beneficial to all Proponents will be answered through a Question & Answer document to be shared with eligible Proponents as per the Schedule of Events below.

Note: CHF reserves the right to not answer questions that do not pertain directly to the subject matter to this RFP, answer questions outside of the deadline (within reason, given the answers would not provide an unfair advantage to any Proponent), as well as not disclose answers to questions where the answers would not benefit other Proponents.

12.0   RFP SCHEDULE OF EVENTS

The CHF reserves the right to change the RFP schedule as needed. Please note that late applications will not be accepted.

RFP Issued	June 15, 2022
Deadline for Submitting a Notification of Intent	June 27, 2022

Deadline for Questions	June 29, 2022
CHF Responses to Questions	June 30, 2022
Deadline for Proposal Submission	**July 05, 2022 @ 11:59 PM MST**
Notification to Proponents for Presentation*	July 08, 2022
Presentation/Interview*	July 11-13, 2022
Recommendation for Award*	August 4, 2022
Anticipated Project Start Date	September 1, 2022

* These dates subject to change

13.0   CONFIDENTIALITY

By accepting to take part in this proposal process you agree to keep in confidence all information imparted to you in relation with the proposal process, not to disclose it to third parties and not to use it for any other purpose than for the Proposal.

CHF will hold all information provided during the proposal process confidential, with the exception of queries made by Proponents. CHF reserves the right to reasonably share queries and its responses with other participating organizations, if applicable.

14.0   FREQUENTLY ASKED QUESTIONS (FAQ)

1. **Why does CHF require this software to have data hosting in Canada?**
    CHF supports a wide range of agency partners (grantees) through grants, who in turn support vulnerable people (program participants) here in Calgary. Provided this work, CHF maintains a robust data set of program participant information provided by agency partners, as well as collecting reports that may also contain personal program participant information. Given the intended use of this grantmaking & grant management software, and its ability to manage grantee information (specifically through possible CRM functions), personal information may be collected through this system as a result.

    As CHF receives funding from both the Federal and Provincial governments, privacy legislation and our funding contracts necessitate that we abide by both PIPEDA, PIPA, and other applicable regulations regarding personal data. The software solution CHF acquires must in turn demonstrate adherence to these requirements.

15.0   EVALUATION OF PROPOSALS

Proposals will be reviewed on the basis of alignment with the goals of this RFP (scope of work), experience, ability to meet technical and opportunity requirements, and available dollars. The RFP proposal will be

evaluated from both the written application and, if shortlisted, the presentation/interview/demonstration by an evaluation panel utilizing the categories found in the Weighted Criteria below.

RFP Panel

The selection of Preferred Proponent(s) (awarded Proponents under this RFP for the allocation of project funding) will be undertaken by the RFP Panel (the "Panel"), who have signed a conflict-of-interest declaration. The Panel's membership may include CHF staff, and individuals with expertise in the RFP subject matter.

No officers, directors, board members or employees of a Proponent will participate in the Panel.

The Panel may consult with others, including other CHF staff members, third-party consultants, and references, as the Panel may in its discretion decide is required.

Selection Process

The first phase of evaluation will consist of CHF screening Proponents responses to ensure they comply with the Mandatory minimum requirements found in Section 5.0 above. Upon completion, compliant Proposals will be submitted to the Panel for further review.

The Panel will consider the Proponents Proposal as well as the Proponents' responses during the presentation/interview to form its recommendation. Upon completion of the Proposal review and interview process, the Panel will deliberate and form a written recommendation to CHF for the selection of a Preferred Proponent(s).

The CHF will make a final decision on awarding contracts and shall negotiate terms of the contract with successful Proponents at its discretion.

Weighted Criteria

Category	Weight
Mandatory Criteria	Pass/Fail
Software Capability • Understanding of Scope of Work • Software features/functionality • Alignment with needs/goals/objectives • Value-Adds	40%
Technical Requirements • Alignment with the technical requirements	25%
Capacity/Experience • Organizational capacity • Demonstrated experience with similar organizations	25%
Financial Value/Cost • Value for dollar	10%

Total	100%	

Disqualification of Proponents

At the sole discretion of the CHF, a Proponent may be disqualified and its Proposal(s) rejected if:

- the Proposal is incomplete and/or missing information and/or contains out of date or incorrect information and/or has not followed the submission instructions in the RFP; or
- a Proponent, in the opinion of the CHF, is not qualified for the scope of work specified (minimum score); or
- an unsatisfactory performance record exists as shown by past or current work for CHF; or
- current commitments exist (CHF or otherwise), which might hinder or prevent the prompt completion of the work.

Should a Proponent be disqualified, no further obligation is required of the CHF, its staff or Board of Directors.

Notification of Results

At the conclusion of this process, all Proponents will be notified.

Proponents may request a debriefing meeting with the CHF at contracts@calgaryhomeless.com at a mutually convenient time. CHF reserves the right to decline such a request if deemed inappropriate.

16.0   ADDITIONAL INFORMATION

Guiding documents and additional information is included with this RFP to assist your organization in developing a proposal.

Current CHF Funding/Agency Website
https://agencies.calgaryhomeless.com/funding/apply-for-funding/

Guiding the Fight Against Homelessness: Strategic Plan to 2025
https://www.calgaryhomeless.com/focus-to-2025/

17.0   TERM OF ENGAGEMENT

CHF will seek to partner with the successful software provider to implement this software by Q3 of 2022.

Proponents should provide a clear description of their contract term or subscription period, including indications of any additional costs that may be incurred by CHF if ends the term/subscription early.

At this time, CHF's intention is to engage with a software partner for an initial period of at least 3 years to provide sufficient time for software adoption, customization, and utilization across our organization and with agency partners. Provided a successful initial period adoption, CHF will seek to have an option to renew for an additional 2 terms of 1 year each for a total of 5 years.

18.0 AMENDMENTS:

This section is reserved for RFP amendment descriptions.

Amendment # 1:

19.0 GENERAL TERMS & CONDITIONS

Eligible Proponents

Any duly incorporated legal entity, that has significant experience providing the Services outlined in this RFP.

CHF Right to Revise

The CHF reserves the right to:

a) revise the RFP Schedule;

b) revise the RFP and/or to issue amendments to the RFP; and

c) reject, cancel or to reissue the RFP in whole or in part if it is deemed in the CHF's best interests, with no penalty, prior to the execution of an Agreement.

No CHF Obligation

This RFP does not commit the CHF in any way to select a Preferred Proponent, or to proceed to negotiations for an Agreement, or to award any Agreement.

No Contract

By submitting a Proposal and participating in the process as outlined in this RFP, Proponents expressly agree that no contract of any kind of services is formed under, or arises from, this RFP, prior to the signing of a formal written Agreement.

Proponent's Expenses

Proponents are solely responsible for their own expenses in preparing and submitting Proposals, and for any costs incurred by the Proponent in meetings, negotiations or discussions with the CHF or their representatives relating to or arising from this RFP.

The CHF and their representatives, agents and advisors will not be liable to any Proponent for any claims, whether for costs, expenses, losses or damages, or loss of anticipated profits, or for any other matter whatsoever, incurred by the Proponent in preparing and submitting a Proposal, or participating in negotiations for an Agreement, or other activity related to or arising out of this RFP.

Conflict of Interest

A Proponent shall disclose in its Proposal any potential, actual or perceived conflicts of interest and existing business relationships it may have with the CHF, its elected or appointed officials, representatives, employees, funded agencies or funders as part of the Mandatory Requirements. A Proponent must disclose

any Relationship of Close Proximity defined as a relationship between any employee, director, officer or volunteer of the Proponent(s) and the CHF where they are or have served as a director, a family member, a past employee or a known future employee. The CHF may rely on such disclosure.

Property of the Owner

All materials submitted in response to this RFP will become the property of the CHF upon delivery to the RFP Coordinator and will not be returned to the Proponent. The Proponent's written response to the RFP, or portions thereof, may also become a part of the Agreement.

Award Terms and Conditions

Upon award, the Proponent will be responsible to adhere to the terms and conditions of all awarded agreement(s) and contract(s), including but not limited to, adherence to all applicable Federal, Provincial and Municipal codes and by-laws and must obtain all required permits and licenses as well as adhere to all safety rules, regulations and labour codes in effect in all jurisdictions where the work is to be performed.

The Proponent agrees to obtain and maintain adequate insurance coverage relating to the operations and liability assumed under the agreement(s) in form and substance satisfactory to the CHF and agrees to indemnify and save harmless the CHF for any claim demand arising out of the performance by the Proponent of the agreement.

Multiple Preferred Proponents

The CHF reserves the right and discretion to divide up the Services, either by scope, case load, geographic area or other basis as the CHF may decide, and to select one (1) or more Preferred Proponents to enter into discussions with the CHF for one (1) or more Agreements to perform a portion or portions of the Services. If the CHF exercises its discretion to divide up the Services, the CHF will do so reasonably having regard for the RFP and the basis of Proposals.

In addition to any other provision of this RFP, Proposals may be evaluated on the basis of advantages and disadvantages to the CHF that might result or be achieved from the CHF dividing up the Services and entering into one (1) or more Agreements with one (1) or more Proponents.

If a joint program Proposal becomes a selected Proponent pursuant to this RFP, the CHF may choose to enter into discussions for individual Agreements with each agency/organization for their portion of the joint program or may enter one agreement with the primary Proponent, and request documentation of a formal partnership with the second agency/organization.

Errors and Omissions

While CHF has used considerable efforts to ensure information in this RFP is accurate, the information contained in the RFP is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by CHF, nor is it necessarily comprehensive or exhaustive. Nothing in the RFP is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in the RFP.

Acceptance of Terms and Conditions

Submitting a Proposal indicates acceptance of all the terms and conditions set out in the RFP, including these RFP rules and appendices to the RFP and any future amendments.

20.0 THANK YOU

Thank you for your consideration of this Request for Proposal. Calgary Homeless Foundation is committed to working with all stakeholders in our community to help all people find their way home.

Sincerely,

Aaron Li, Manager, Contracts & Procurement
Calgary Homeless Foundation

APPENDIX A: SELF DECLARATION

A Proponent shall disclose any potential, actual or perceived conflicts of interest and existing business relationships it may have with the CHF, its elected or appointed officials, representatives, employees, funded agencies or funders.

A Proponent shall disclose any relationship between any Representative of the Proponent(s) and any Representative of CHF including where:

(i)   The Representative of the Proponent presently or previously serve(d) as a Representative of CHF;

(ii)   A Representative of the Proponent and a Representative of CHF are Family; or

(iii)   It is known that a Representative of the Proponent will become a Representative of CHF in the future, or

(iv)   It is known that a Representative of CHF will become a Representative of the Proponent in the future.

For the purposes of this Conflict of Interest declaration:

   (i)   a "Representative" means an employee, director, officer, volunteer or contractor;

(ii)   "Family" means a spouse, common-law partner, domestic partner. child, grandchild, great grandchild, parent, parent-in-law, brother, sister, brother-in-law, sister-in-law, son-in-law, daughter-in-law, aunt, uncle, great aunt, great uncle, cousin or second cousin and includes foster and step relationships for any of the above.

CHF may rely on such disclosure

☐ I/We declare no conflicts.

☐ I/We declare the following conflicts.

Where a conflict exists, at minimum two (2) members of CHF executive or board representatives will review declaration to determine if Proposal shall be accepted or rejected.

Name & Title (printed): _____

Signature: _____ **Date:** _____

APPENDIX B: CURRENT WORKFLOW OVERVIEW

Below is an overview of the current contracting, grantmaking/procurement and grant management workflow process. Proponents should utilize elements of this Appendix B and highlight in their proposal how their proposed software solution can support/enhance this process.

	Planning & Development	Solicitation (Grant/RFP Process)	Evaluation & Scoring	Award	Implementation	Program Management	Monitoring & Evaluation
HSSC/Strategy Team	• Development of guiding principles • Draft scope, timeline, budget -Approval/signoff (VP) • Revisions & final approval • Flag risks/opportunities • Design assessment tools • Support communication	• VP & System Planners (SP) communicate/liase with agency/vendor partners • Support/lead information sessions	• Review applications using assessment tools • Record notes & score - shortlist	• Initial call/discussion with agencies (award & non-award) • Initial negotiation	• Contract & Procurement Request form generation • HSSC approval of scope / budget- SA/SB (Contract documents) • Coordinated system planning - CAA, training, HMIS access	• Accountability management • Accreditation • Reporting requirements • Amendment requests - CPR • Amendment SA & SB as required	• Mid year program review • Program evaluation • Data review • Financial review • Reflective practice • report generation
Contracts & Procurement Team	• Draft RFP/Opportunity template • Collaborate/support HSSC on drafting process • Project management supports • Revisions • Scheduling • Legal support/review as required • Draft application documents • draft review/assessment documents & tools • Create & organize review/evaluation panel	• Post on CHF webpage • Post on other channels as appropriate (job posting sites/Canadian Evaluation Council, etc.) • Communication to sector partners • Reminders/Pre-registration/Notice of Intent • Collect questions • Receive & collect responses • File, organize, & log • Create review packages	• Provide evaluation panel with review packages & provide training as necessary • Organize, setup & facilitate evaluation sessions • Setup proponent interviews if required. • Compile scores & notes - shortlist • Enhance scores & log • Finalization & official record/report	• Formal notification/offer letter • Public notice - post on website	• Generate/draft & issue contracts • generate unique contract # & log into Contract Control Sheet • Negotiate terms & conditions as required • Gather accountabilities • Data Sharing Agreements/Participating Agency Agreements as required • Final contract processing, signing, & execution • Contract filing & logging	• Contract support as required • Amendment support as required • Generate unique contract amendment # & log into Contract Control Sheet • Amending agreement support, generation & issue • Amendment processing, signing & execution • Amendment filing & logging • Accountability/reporting support as required	• Funder report generation
Finance Team	• CHF projects/programs budget tracking • work with HSSC to identify surplus/deficit		• Financial review/forecast/planning	• Financial review/forecast/planning	• Review & approval of budgets (SB) • Master program budget update • Cheque request generation	• Upstream quarterly reporting • Program/Finance communications (surplus letters, confirmation of revenue) • Financial reviews (payments) • Amendment implications • Cash Flow monitoring	• Audit requirements/review