RFP Proposal Response Form

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| Instructions:   1. Prior to proposal submission, please submit a notice of intent to CHF by June 27, 2022. Form can be found here: [**Notice of Intent**](https://forms.office.com/Pages/ResponsePage.aspx?id=2GugXMzBMkK2Q3-ptBH1_nF9yPFyuopEhdm2n8Bbl49UNDJPUVNFNzdDTFlCS1FMNlREREhIUjlOUS4u) 2. Once CHF has been notified, complete this form in its entirety and submit as PDF via email prior to submission deadline, with email subject line: RFP22085 Response   Do not include unnecessary attachments or documents with your submission unless otherwise indicated. |
| Deadline for Proposal Submission: July 5, 2022 @ 11:59 PM MST  Please submit proposals and any questions to [funding@calgaryhomeless.com](mailto:funding@calgaryhomeless.com) |

1. Proponent Information

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| Proponent Name (as formally registered) | Click here to enter text. |
| Proponent Address | Click here to enter text. |
| Proponent Website | Click here to enter text. |
| Proposed Program Name | Click here to enter text. |
| Primary Contact Name & Position | Click here to enter text. |
| Primary Contact Phone # | Click here to enter text. |
| Primary Contact Email Address | Click here to enter text. |
| Secondary Contact Name & Position | Click here to enter text. |
| Secondary Contact Email Address | Click here to enter text. |

1. Corporate Experience/Capacity
2. Please describe and outline your organization’s experience and capacity with similar projects of this nature.
3. The Proponent should provide a brief executive summary describing their general background in terms of relevant expertise and the number of years it has been delivering solutions similar to those outlined in this RFP. Proponents whose Proposal details the following will receive a higher score:
   * Public sector or non-profit/charitable Foundation (grantmaking) experience in Canada;
   * Long term relationship with a complex client that demonstrates successful implementation of solutions from planning, staging, technology implementation, change management and training.

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| Click or tap here to enter text. |

1. **Success Factors**

The Proponent should identify, in their experience, up to three critical success factors associated with the successful delivery of this type of a solution, over the past five years. Responses will be evaluated based on level of detail, applicability to CHF given the scope of this RFP and level of insight demonstrated.

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1. **Risk Mitigation**

Proponent should identify the top three (3) risks it believes may arise while providing the Solution together with its plan to mitigate such risks. The Proponent will be rated on its proposed plan to identify and to mitigate such risks, and any unique features of its proposal that will contribute to mitigating the risks identified.

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| Click or tap here to enter text. |

1. Please provide 3 references that can speak to your organizations experience in providing, supporting, and maintaining this proposed software solution. Please provide name of organization, and relevant contact information.

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| 1. Click or tap here to enter text. |
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1. Software Solution/Requirements
2. Please provide a brief outline and overview of the program your organization is proposing, including identification and appreciation of CHF’s key needs outlined in this RFP.

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| Click or tap here to enter text. |

1. Utilizing the chart below, please indicate if your software solution has the following features or can meet these key objectives and capabilities. Space is provided for any notes indicating how/where this feature is met if required. Proponents should provide any rationale/alternatives if any of these objectives/capabilities are unable to be met.

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| Functional Objectives and Capabilities | Checklist | Notes |
| 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, outcome, 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 |  |  |
| 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 |  |  |

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| Service Objectives | Checklist | Notes |
| Have readily accessible supports available from software partner if required – help desk, training, updates, availability, 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 |  |  |

1. In addition to the list of objectives above, if applicable, please describe any value adds that your software has that CHF has not already indicated as a need/objective. What sets your software solution apart from others in your competitive space?

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1. Technical Requirements
2. Given CHF’s list of technical requirements as listed in section 5.0 of the RFP, as well as in the chart, below, please provide an overview of how your proposed solution can meet CHF’s needs. Additionally, please use this space to highlight additional technical benefits to your proposed software solution.

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| Click or tap here to enter text. |

1. Does your proposed solution have data hosting in Canada?

Yes

No

If yes, where is this data hosted, and with who?

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| Click or tap here to enter text. |

1. Please indicate if your solution meets the following technical requirements in the chart below. Space is provided under notes to describe your solution.

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| Technical Requirements | Checklist | Notes |
| 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) |  |  |

1. Budget Proposal
2. How much will this proposed project cost? Proponents should provide a detailed list of costs associated with their software solution. Please include any optional add-on’s, training costs, migration costs, license costs, user costs and any other relevant costs of ownership/operation. (Add rows as necessary).

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| Category | Quantity | Costs | Notes |
| *Example: User license* | *1* | *$1000.00* | *Monthly Cost* |
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| Total |  |  |  |

1. Other Details & Attachments (if required)
2. As CHF is relying on the expertise of the Proponents to support the work outlined in this RFP, please outline any other information that may be relevant to CHF in support of your proposal (additional timelines, data, etc.).

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1. Please attach any other relevant documents that support your Proposal and are relevant to the needs identified in this RFP
2. Mandatory Requirements Checklist

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|  | Requirement | Check |
| 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 |  |

**Thank you for your interest in this opportunity. CHF will contact you for further details if required.**