



# Request for Expressions of Interest for a new Customer and Grants Management Solution

Version 1.0

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## A. Request for Expressions of Interest (EOI)

### 1. Purpose of EOI

The purpose of this EOI document is to invite suppliers to participate in a business transformation and digital initiative, through the procurement of a best-in-class Customer Relationship and Grants Management solution platform. Driven by goals of greater efficiency, effectiveness, flexibility, and equity, this opportunity from the Canada Council for the Arts will not only transform how business is conducted for the benefit of its customers but will also significantly impact the many artists and arts organizations in Canada and beyond. To achieve this transformative vision, the Council is seeking the participation of skilled and innovative suppliers, with expertise in platform integration and business application development, and willing to engage in a fast-paced and highly collaborative procurement process.

### 2. Business Overview

#### [About the Canada Council for the Arts](#)

The [Canada Council for the Arts](#) contributes to the vibrancy of a creative and diverse arts and literary scene and supports its presence across Canada and around the world. The Council is Canada's public arts funder.

Its grants, services, initiatives, prizes, and payments support Canadian artists, authors, and arts groups and organizations. This support allows them to pursue artistic expression, create works of art, and promote and disseminate the arts. In the year [2020-2021](#), the Council awarded \$314.6M in grants to 2,068 organizations and 3,418 groups and artists, with the addition of 69 prizes and fellowships, and 17,925 public lending rights payments. Through its arts funding, communications, research, and promotion activities, the Council fosters the engagement of Canadians and international audiences in the arts.

The Council's Art Bank provides the broader public with a collection of over 17,000 Canadian contemporary art works to enjoy through its rental, loan, and dissemination programs.

The Canadian Commission for UNESCO operates under the authority of the Council. It shares a common history and future with the Council in terms of sustainable development characterized by the arts, science, culture, equality, and peace.

In April 2021, the Council launched its 2021-26 Strategic Plan, [Art, now more than ever](#), that will guide the Council's work towards the emergence of a more sustainable, resilient and equitable arts sector. Through its strategic plan actions, the Council will invest in the rebuilding of the arts sector, with a focus on innovation, equity and collaboration across sectors.

#### [About Grants and Contributions activities \(G&Cs\)](#)

The Council supports the Canadian arts sector through a variety of **funding opportunities**. These include grants to artists, arts groups, and organizations in support of their project or to sustain their ongoing operations; contribution agreements and partnerships to advance the arts sector, prizes and fellowships, and annual payments to authors.

The Council's funding model includes six outcomes-based granting programs that strive to foster excellent, vibrant, and diverse art that engages Canadians, enriches their communities, and reaches



markets around the world. In addition to its regular programs, the Council makes use of strategic funds that respond to specific opportunities or issues in the arts sector, delivers the Council's Public Lending Right (PLR) program which makes annual payments to creators whose works are held in Canadian public libraries.

#### About Non-Granting activities

In addition to grants and payments, the Council also engages in numerous non-granting activities including research, communications, and promotion initiatives that contribute to a vibrant arts sector that engages the Canadian public.

The Art Bank offers Canadians unique public access to contemporary Canadian visual art through its three programs – art rental, loans to museums and outreach projects.

The Âjagemô art space at the Canada Council for the Arts features performances, events, and exhibitions of contemporary Canadian art, including work from the collection of the Canada Council Art Bank.

The Canadian Commission for UNESCO (CCUNESCO) serves as a bridge between Canadians and the vital work of UNESCO—the United Nations Educational, Scientific and Cultural Organization. Through its networks and partners, the Commission promotes UNESCO's values, priorities and programs in Canada and brings the voices of Canadian experts to the international stage.

#### Current challenges and gaps

From 2016 to 2021, the Council doubled its annual budget, with an increase from \$180M to \$360M. In 2017, the Council developed and implemented a more open and flexible outcomes-based funding model, which led to an increase in the volume of operations and types of applicants. With its ambitious strategic plan for 2022-2026, *Art, now more than ever*, the Council now aims to increase the scope and breadth of the support it provides to the arts sector.

While the Council began to modernize its ways of working, its systems, and its processes through the Digital Shift initiative, namely transitioning from paper-based to digital-based applications and processes, the Council still operates a legacy arts tracking system (ATS) to support its contact and grants management capabilities.

With an increase in volume of operation and types of applicants, alongside a strategic commitment to increase access to its funding opportunities for underserved communities, the Council has limited tools to support services to its customers and lacks a unified and integrated user experience for staff and customers, robust case management capabilities and enterprise-class data model and integration to support business intelligence. For more details on current challenges and gaps, see Table 1.

#### Towards a customer-focused business transformation

To address some of the challenges and gaps identified, the Council will undertake a business transformation of its granting activities over the next 3 years, namely replacing systems, reengineering processes, and introducing technology, to better align its operating model with strategy and vision.

This vision is to ensure that the Council's staff have optimum human-centered systems, processes, and tools to work more efficiently and effectively, while increasing the equity of, the access to, and the overall customer experience, of granting and non-granting activities.



To support this vision, this business transformation program is also informed and steered by the Council's Client Care Strategy, which aims to apply human-centered design principles to the way the Council designs, delivers and evaluates its services to the arts community. This strategy aims to advance equity, reduce biases and ensure equitable access to its funding opportunities and other non-granting services; design grant processes to improve efficiency and effectiveness, from a user-centered perspective; and elevate the client experience beyond the application process.

Table 1 - Funding Opportunity Challenges and Gaps

| Challenges   | Gaps   |
|--|--|
| Funding opportunities and other interventions are challenging to set up, and the legacy system lacks ease of enhancement and flexibility.  | Lack of capability to design, test, implement or change funding opportunity procedures.  |
| Limited capacity to manage high volumes of customer inquiries and applications for funding opportunities   | Granting processes and workflows are not standard, scalable or adaptable to risk level.  |
| Heavy manual workload due to dated systems and repetitive and/or low-value tasks are not triaged and are limiting staff capacity to work on more valuable work or meet service standards.                        | Lack of automation and heavy manual workloads slow down operations. Other systems and tools are required to support experience, but integration is limited.  |
| Advanced analytics and reporting capabilities are only accessible to a few experts and granting and non-granting activities data are not circulating freely across divisional silos.                             | Lack of data models and data management restrict a Council-wide solution. Training in advanced analytics and business intelligence is lacking.   |
| The legacy system is hard-coded, uses an obsolete programming language, does not integrate with other systems, is difficult to learn and navigate for users and is unable to match the Council's evolving needs. | Lack of built-in adaptability to the evolving needs of the business, and lack of support for future-ready technology   |
| There are issues reported by users at several steps of the granting lifecycle, identifying opportunities for support, accessing funding, understanding decisions.  | The user experience of customers, staff and other stakeholders isn't conducive to a positive user experience. Case management capabilities are lacking, resulting in poorly integrated experience for customers and staff. |
| Staff spending significant amount of time and effort spent providing individualized support to applicants isn't sustainable (or scalable)  | Lack of a simple and intuitive system requires excessive support practices, including a lack of access to self-help tools or guides for applicants.  |



### 3. About the Customer and Grants Management System

#### Project definition

Each grant awarded to a customer corresponds to an application file which is tracked and managed using the Council’s in-house application system, known as Arts Tracking System (ATS). Situated at the core of Council’s operations, ATS provides numerous functions with the major components being contact management and grants management.

Having been in place and maintained since 1998, other systems and tools have been developed and connected to ATS to further support the end-to-end granting and non-granting processes, including a customer-facing application portal, a results package tool, and a site for assessors to access applications, all of which are connected to ATS. However, because of its limitations, the Council recognizes that ATS is no longer adequate to fulfil its needs and, more importantly, to serve Council’s future objectives.

Moving away from a custom-built legacy system, the Council is looking to modernize its granting processes including replacing ATS. Therefore, the Council has launched **a project to implement an integrated Customer and Grant Management System (CGMS)**, to support the modernization and transformation of the Council’s granting and customer relationship management, and to improve its strategic capacity and core business capabilities. While CGMS will modernize the granting and non-granting processes and enhance the customer relationship management, the Council is also looking for a solution that will be integrated within the broader Council business environment, and as much as possible, take full advantage of the updated business applications and digital infrastructure that are part of the Council’s larger [Digital Shift Initiative](#).

#### CGMS Project Objectives

CGMS has specific objectives that echo the Council’s Transformation objectives and outcomes – See table 2.

*Table 2 - CGMS Project Objectives and outcomes*

| Objectives  | Outcomes  |
|---|---|
| <ul style="list-style-type: none"> <li>Support the effectiveness of funding opportunities in achieving their intended outcomes.</li> </ul>                    | <ul style="list-style-type: none"> <li>Greater ease and flexibility in creating and administering Funding opportunities</li> <li>Adaptable workflows and funding and matched to the risk variable or process complexity level.</li> <li>Customers find the right funding opportunities that match their goal and receive feedback that helps improve the quality of their interactions with Council.</li> </ul> |
| <ul style="list-style-type: none"> <li>Streamline workflows and accelerate processes related to granting programs delivery for greater efficiency.</li> </ul> | <ul style="list-style-type: none"> <li>Funding opportunities are created and administered with greater ease and flexibility to achieve desired outcomes.</li> <li>Workflows and funding requirements are adaptable and matched to the risk variable or process complexity level.</li> </ul>   |
| <ul style="list-style-type: none"> <li>Elevate the user experience throughout the holistic grant application process.</li> </ul>                              | <ul style="list-style-type: none"> <li>Employee empowerment: enabling staff to spend more time on value-added work and activities</li> <li>Customer interactions with the Council are made with less time and effort, with accessibility and equity in mind</li> </ul>  |



- 
- Improve data and analytics capacity and advance on data intelligence to inform granting and non-granting business decisions.
  - **Qualitative and quantitative data is captured and powers automated workflows and decision-making**
  - **Information and data flow across divisional silos, enabling shared insight and a cohesive understanding of our impact.**
  - **Customers have a better understanding of past, current, and future Council activities, which drives their engagement.**
  - **Improved data and reports related to assessment**
  - **Develop and implement a data intelligence approach to support the Council to demonstrate results and impact of its investments**
- 

### Scope of work

- **Delivery of a modernized and integrated grants management system solution**, covering the full end-to-end granting lifecycle (from arranging, applying, assessing, awarding, reporting, and auditing), and other developments to support the Council's non-granting activities, by leveraging advanced capabilities that are enabled by cloud-delivered applications and platforms
- Delivery of foundational Customer Relationship Management system modules to support the solution, as required
- Review of current business applications and database environment and exploration of their ability to be integrated as part of the solution

### General Project Timeline

- From release of EOI to selection of a solution provider (4-5 months)
- Project timeline aims to begin development in January 2023
- First key deliverable during Q1-2023-2024 (April-June)
- Implementation to follow as release stages during Q2-2023-2024 (July-Sept)

## 4. Procurement Process Overview

### Competitive Evaluation Stages

To increase our responsiveness to a dynamic environment, while remaining open and flexible to new opportunities for including new digital capabilities, the Council is adopting a collaborative and practical procurement approach to validate its assumptions about potential solutions, identify the most effective solution to achieve its business outcomes, and select an implementation partner best suited to deliver the solution. This "agile procurement" approach consists of the following competitive evaluation stages.

*Important: To be considered for the final bid of this project, suppliers must engage with the procurement process as of Stage 1. Late submissions or applications submitted after Stage 1 closeout won't be considered for further evaluation stages.*

### Stage 1: Request for information

As a response to this EOI, suppliers must submit an information package (see section B for package requirement), which will be evaluated against the published criteria for stage 1. Suppliers that successfully meet criteria will be considered for the next evaluation stage. Only the highest-ranking suppliers will be contacted to participate in the next procurement stage activities. During this stage,



suppliers will be invited to submit their questions prior to submitting their Response to EOI Document. **The Response to EOI Document must be submitted before the due date.** At the Council's request, suppliers may be invited to submit additional information for review.

### Stage 2: Proof of Value Proposition

Suppliers selected for the next stage of the procurement process will be invited to engage in a collaborative discovery session leading to a 1<sup>st</sup> series of practical demos, based on business scenarios or use cases as specified by the Council. Defined by epics and user stories that depict the perspective of general user personas, the goal of these demos is to convey a tangible proof of value that the solution could provide to modernize standardized granting processes.

**Selected suppliers will have 2 weeks to develop the demos and an additional 5 business days to present their solution demo.** The review of the demos for this stage will introduce new evaluation criteria. Similar to Stage 1, suppliers that successfully meet Stage 2 Criteria will be considered for the next evaluation stage. Only the highest-ranking 2 to 3 suppliers will be contacted to participate in the next procurement stage's activities. At the Council's request, suppliers may be invited to submit additional information.

### Stage 3: Proof of Concept

Suppliers selected for the next stage of the procurement process will be invited to conduct a 2<sup>nd</sup> series of practical demos (2 to 3), based on specific business challenges as defined by the Council. These demos will focus on significant business challenges.

**Selected suppliers will have 3 weeks to develop the demos and an additional 5 business days to present their solution demo.** In addition to preexisting criteria, additional criteria will be added for the round of demos. At the Council's request, suppliers may be invited to submit additional information.

At this stage, once the scope for the delivery of the solution has been confirmed with the collaboration of the supplier, the Council will request a quote for a 5-year Total Cost of ownership including, but not limited to, services for the implementation, the licensing, the maintenance of the solution, along with the required training, support, knowledge transfer and internal capacity building.

### Demo environment

For stages 2 and 3, suppliers are expected to demonstrate their solution's abilities within their own test environment. However, the solution's environment used for the purpose of the demos shall be representative of the solution's actual or intended implemented environment.

### Confirmation of solution and selection of supplier

Upon evaluation of the proof of concepts, the Council will engage the selected supplier in discussion that may lead to a Master Service Agreement (MSA) for the implementation of the most suitable solution.

### Procurement Evaluation Criteria

Each stage of the procurement process will be evaluated against the following high-level criteria- See table 3.



*Table 3 - CGMS Evaluation Criteria*

| Evaluation Stage                                    | Evaluation Criteria (High Level)  |
|---|---|
| <b>Stage 1</b><br><b>Request for Information</b>    | <ul style="list-style-type: none"> <li>- Supplier's experience</li> <li>- Supplier's business capabilities</li> <li>- Supplier's organizational maturity</li> <li>- Supplier's ability to achieve high-level Business Outcomes</li> <li>- Supplier's ability to satisfy high-level Non-Functional Requirements</li> <li>- Supplier's ability to satisfy enterprise architecture principles</li> </ul>   |
| <b>Stage 2</b><br><b>Proof of Value Proposition</b> | <ul style="list-style-type: none"> <li>- Solution's ease of implementation/configuration (presence of pre-configured modules, templates or accelerators)</li> <li>- Solution's ease of use and overall user experience</li> <li>- Solution's demonstrated ability to effectively achieve desired business outcomes (e.g., end-to-end granting lifecycle)</li> <li>- Solution's demonstrated ability to leverage advanced analytics and business intelligence</li> <li>- Solution's demonstrated ability to leverage future-ready technologies (e.g., process automation, artificial intelligence, etc.)</li> <li>- Supplier's references of past solution implementation</li> </ul> |
| <b>Stage 3</b><br><b>Proof of Concept</b>           | <ul style="list-style-type: none"> <li>- Same Criteria as stage 2 plus:</li> <li>- Solution's demonstrated ability to effectively meet the Council's business and enterprise needs</li> <li>- Solution's demonstrated ability to effectively integrate with the Council's enterprise system architecture and systems and databases.</li> <li>- Supplier's ability to collaborate, provide training and support</li> <li>- Solution's Total Cost of Ownership (TCO) for 5 years</li> </ul>   |

## 5. High Level Business and Technological Requirements

### Business goals and outcomes (functional requirements)

The Council has established the desired business goals and outcomes that the solution will need to achieve. As part of Stage 1 – Request for information, Suppliers must specify their ability for their solution to achieve the following business goals and outcomes – See table 4 and 5. Provided as appendix to this document, are the Epics related to each of these goals and outcomes, which describe the high-level business requirements. Detailed user stories will be shared with suppliers upon Stage 2 of evaluation.



*Table 4 - GMS Capabilities requirements*

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|  |   |
|--|---|
| <ol style="list-style-type: none"> <li>1. Define global workflows, rules, and content</li> <li>2. Manage funding opportunities (FO)</li> <li>3. Manage funding cycle</li> <li>4. Manage stakeholder information</li> <li>5. Build FO awareness and engagement</li> <li>6. Manage interactions</li> <li>7. Manage intake of funding applications</li> </ol> | <ol style="list-style-type: none"> <li>8. Manage assessment of funding applications</li> <li>9. Manage awarding and notification of results</li> <li>10. Administer funding agreements</li> <li>11. Monitor funding agreements and outcomes</li> <li>12. Report, audit and analyse FO performance and outcomes</li> </ol> |
|--|---|

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*Table 5 - CRM Capabilities requirements*

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|   |   |
|---|---|
| <ol style="list-style-type: none"> <li>1. Reporting and Dashboards</li> <li>2. Real-time Data and Business Intelligence</li> <li>3. Forecasting</li> <li>4. Usability</li> <li>5. Workflow and BPM support</li> <li>6. Workforce Engagement Management</li> <li>7. Lead Management</li> </ol> | <ol style="list-style-type: none"> <li>8. Interaction Tracking</li> <li>9. Document Management</li> <li>10. Customer Self-Service</li> <li>11. Communications Management</li> <li>12. Omni-Channel Management</li> <li>13. Customer Satisfaction and Feedback</li> <li>14. Campaign Management</li> </ol> |
|---|---|

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Non-Functional Requirements

The Council has established the high-level non-functional requirements (NFR) that the solution will need to achieve. As part of Stage 1 – Request for information, Suppliers must specify their ability for their solution to meet the must-have NFRs under the following process groups – See table 6. Provided as appendix to this document, are the NFR that are considered critical for stage 1 of evaluation.

*Table 6 - CGMS high level non-functional requirements groups*

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|   |   |
|---|---|
| <ol style="list-style-type: none"> <li>1. Compatibility</li> <li>2. Interoperability</li> <li>3. Maintainability</li> <li>4. Reliability</li> <li>5. Scalability</li> </ol> | <ol style="list-style-type: none"> <li>6. Security and Privacy</li> <li>7. Support</li> <li>8. Testability</li> <li>9. Usability</li> </ol> |
|---|---|

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Digital Shift Initiative and Enterprise Architecture

Under the banner of an ambitious Digital Shift initiative, the Council is undertaking numerous projects to replace its legacy Information Technology (IT) and to replace legacy applications and modernize the common desktop suite of IT products. Considered a key project in this roadmap, CGMS is guided by 12 Enterprise Architecture Principles. – See Table 7.



*Table 7 - Canada Council's 12 Enterprise Architecture Principles*

|   |   |   |
|---|---|---|
| <p><b>Business Value</b><br/>Aim to provide long term benefits to the whole enterprise, while optimizing total cost of ownership and minimizing risks</p>                       | <p><b>User centricity</b><br/>Deliver the best experiences for internal and external users with services and products</p> | <p><b>Solution Delivery</b><br/>Use project management best practices and stewardship to control and deliver solutions while remaining in scope, on time and within budget.</p> |
| <p><b>Custom Build as a Last Resort</b><br/>Maximize reuse of existing solutions or acquire ubiquitous, manufactured products. Only as a last resort build custom solutions</p> | <p><b>Simplicity</b><br/>Choose the simplest solutions and reduce operational complexity of the enterprise</p>            | <p><b>Fit for Purpose</b><br/>Maintain capability levels and create solutions that are fit for purpose without over-engineering</p>   |
| <p><b>Digital Innovation</b><br/>Seek ideas and innovative ways to utilize technology for Council advantage</p>   | <p><b>Lawfulness</b><br/>Operate in compliance with applicable laws and legislation</p>                                   | <p><b>Manage Information</b><br/>Data creation, modification and use to achieve an enterprise-wide data capability in compliance with policies</p>                              |
| <p><b>Control technical variety</b><br/>Standardize production inventory and control the variety of technology hardware and software in use</p>                                 | <p><b>Manage IT Security</b><br/>Manage IT security enterprise-wide following policy and best practices</p>               | <p><b>CapEx to OpEx</b><br/>Strategically reduce capital expenditure asset maintenance and increase operating expenditure services contracts</p>                                |

Application Architecture

The technologies supporting Council’s current architecture of systems at council are predominantly Microsoft based. The products and services used include:

|   |  |
|---|--|
| <ul style="list-style-type: none"> <li>• Azure Cloud</li> </ul>                   | <ul style="list-style-type: none"> <li>• Power BI</li> </ul>                       |
| <ul style="list-style-type: none"> <li>• SQL Server</li> </ul>                    | <ul style="list-style-type: none"> <li>• M365 apps</li> </ul>                      |
| <ul style="list-style-type: none"> <li>• Dynamics</li> </ul>                      | <ul style="list-style-type: none"> <li>• DevOps</li> </ul>                         |
| <ul style="list-style-type: none"> <li>• Power Apps and Power Automate</li> </ul> | <ul style="list-style-type: none"> <li>• OneDrive</li> </ul>                       |
| <ul style="list-style-type: none"> <li>• Logic Apps</li> </ul>                    | <ul style="list-style-type: none"> <li>• Azure Active Directory and B2C</li> </ul> |
| <ul style="list-style-type: none"> <li>• SharePoint, (PaaS and SaaS)</li> </ul>   |  |

Custom-built applications were developed in-house using Microsoft Visual Studio and include both desktop and web-based solutions hosted on Microsoft Internet Information Server. Microsoft SQL Server is used as the database management system for all In-house applications.

Non-Microsoft/COTS systems used at the council include:

- Unit4 Cloud – HR/Finance ERP
- Sitecore – Content Management for Council’s website
- Cherwell – IT Service Management

Although the council is working towards moving all it’s on-prem infrastructure to the cloud, there are still some legacy systems hosted on-prem.



## B. Information Required from Suppliers

### 1. Suitability of Supplier

#### Eligibility

Are considered eligible to participate in the procurement process, suppliers that can provide a solution in the form of:

- CRM or iBPM application platform integration.
- Grants Management Solution (GMS) built on CRM or iBPM Platform
- Platform integration partners with the capacity to leverage CRM, iBPM and GMS capabilities.

#### Exclusion

Are considered excluded from participation in the procurement process, suppliers that correspond to the following:

- Software vendors with no integration capabilities
- Suppliers of “Stand-Alone” Commercial “off-the-shelf” solution
- Suppliers of ERP modules as a “solution”

#### Availability of solution

- Solution must be available and have a proven track of successful implementations.
- Solutions under development or that are not already available to the market will not be considered for evaluation.

#### Conflict of interest

All staff of the successful firms involved in the project and named in the contract will be required to complete the Canada Council’s Conflict of Interest form. All retained consultants with an active grant must disclose this situation in the Council’s Conflict of Interest Disclosure Form. At the beginning of their employment, these consultants may be required to decline their grants or put their current grant(s) on hold or until such time as they are no longer contracted by the Canada Council.

### 2. Summary of Supplier’s Profile

To initiate their participation in the procurement process and to be considered for Stage 1 of the evaluation, suppliers must respond to this Request for Expression of Interest with an information package before the [deadline](#). The information provided in the supplier’s response will be the basis for the evaluation of their suitability to engage at future stages of the procurement process.

#### Organizational capacity and maturity

The Council is looking to establish a collaborative relationship with a supplier that has sufficient capacity to undertake the project and adequate organizational maturity to complete the project. Therefore, as part of their **Response to EOI Document**, the required information includes, but is not limited to:

- Professional memberships
- Number of years in business
- Financial capacity
- Geographical area
- Number of Full-time employees (FTEs)



- Technology knowledge, past experience and resources available
- Project Management maturity
- Organization effectiveness
- Confirmation of Business Continuity and Disaster Recovery Plan
- Any other information relevant to this assessment

#### Capabilities, expertise, and methodologies

With respect to the project's overall objectives and the broader context in which it is set, suppliers are expected to provide information on relevant and proven capabilities, including but not limited to:

- Business Acumen on Grants and Contributions Management
- Business Process Transformation
- Organizational Change Management
- Technology Architecture/Integration
- Digital Design and User Experience
- Customer Data Analytics and Data Intelligence
- Customer Experience Data Architecture
- Customer Service/Support Experience
- Marketing CRM Experience
- Any other information relevant to this assessment

#### Pricing model and estimation

Suppliers are requested to specify their service pricing model and provide a ballpark estimate pricing for the [scope of work](#) as part of their response to this EOI document.

#### Supplier Capacity to meet Requirements

Suppliers are requested to specify their capacity to meet and achieve the high Level Business and Technological Requirements by filling the Excel form named "CGMS\_Requirements\_Evaluation\_Supplier.xlsx" and submit it as part of their response to this EOI document.

#### Past Relevant Experience

As part of the information submitted to the Council in response to this EOI, suppliers are expected to submit information on relevant experiences from the past 3 years, including but not limited to:

- Examples of two (2) completed engagements related to CRM or GMS
- Examples of system configuration and support provided
- Examples of content and data migration planning and activities.
- Examples of effective Quality Insurance planning and activities
- Examples of two (2) data analytics and intelligence projects
- As applicable, testimonials from past or current customers
- Any other information relevant to this assessment

#### Supplier Diversity:

##### *Supplier Diversity and Inclusion Policy/Program*

Supplier to indicate if its organization is classified as diverse. If yes, indicate all applicable diversity classifications below, and provide a copy of any available certification as attachment X.X - Diversity Certifications.



*Organizational Diversity and Inclusion Policy/Program*

Supplier to:

- a. Confirm it has a Diversity and Inclusion Policy/Program
- b. Provide a screenshot of the table of contents of the Diversity and inclusion Policy /Program as Attachment X.X - Table of Contents Diversity and Inclusion Policy/Program
- c. Provide a contact name, phone number and email whose role is to manage the Diversity and Inclusion Policy/Program
- d. Describe how the Diversity and Inclusion Policy/Program is being promoted across the organization
- e. Indicate the targets/goals of the organization and describe how they are being measured

### 3. Submission of Expression of Interest

#### Timeline and Submission Instructions

The following times, dates and activities apply to this EOI process, and are estimates which may be revised:

| <b>MILESTONE DATE</b>                  | <b>ACTIVITY</b>                              |
|--|--|
| <b>August 23, 2022, 11:59 PM EST</b>   | Release of EOI to suppliers                  |
| <b>August 29, 2022, 11:59 PM EST</b>   | Deadline for Suppliers to submit Questions   |
| <b>September 2, 2022, 11:59 PM EST</b> | THE COUNCIL's Response to Supplier Questions |
| <b>September 9, 2022, 11:59 PM EST</b> | Response to this EOI document due date       |

All Questions and completed EOI should be submitted via email to [cgms-project@canadacouncil.ca](mailto:cgms-project@canadacouncil.ca) prior to the above Response to this EOI document due date. Suppliers should submit in PDF, PPT, or WORD format (PDF Preferred) and use the following subject lines:

*Canada Council for the Arts – Supplier Name Response*

Any withdrawal of the Response to this EOI document should be in writing (email is acceptable). Any modification may be made by withdrawal and re-submission of the Response to this EOI document, or by issuance of an addendum; however, The Council prefers modifications be submitted in the form of a revised Response to this EOI document; with any deletions and modifications highlighted. All modifications should otherwise comply with the requirements applicable to the Response to this EOI document.



Contact Information

Suppliers are expected to provide key contact information for a primary and secondary Supplier Representative to whom all communications regarding its Response to this EOI document are to be sent.

|                                | Primary Supplier Representative | Secondary Supplier Representative |
|--------------------------------|---------------------------------|-----------------------------------|
| <b>Name</b>                    |                                 |                                   |
| <b>Title</b>                   |                                 |                                   |
| <b>Address</b>                 |                                 |                                   |
| <b>Office Telephone Number</b> |                                 |                                   |
| <b>Cell Phone Number</b>       |                                 |                                   |
| <b>Email Address</b>           |                                 |                                   |
| <b>Website</b>                 |                                 |                                   |

Acceptance or Rejection of Response to this EOI document

Only complete Response to EOI Document submitted by the due date will be accepted and considered for evaluation. Submission coming from supplier listed in the exclusion section will also not be considered for evaluation. The Council reserves the right to accept or reject submissions at its sole discretion.

Period of validity

Suppliers are expected to confirm and maintain their interest for this engagement for at least 120 days.



## C. General Terms and Conditions

### General Terms and Conditions of engagement

This EOI document is the property of the Council and this EOI document and the Council during this EOI process shall not be disclosed, copied, or used in whole or in part, except to the extent necessary for, and for the sole purpose of, Supplier participation in this EOI process, without prior written approval obtained from the Council's representative.

THE COUNCIL does not grant supplier any right, title, interest or license in any designs, logos, slogans, or other distinctive marks belonging to or licensed to The Council or to any material which is subject to a copyright owned by the Council. Supplier shall not refer to any Trademark or use such copyrighted material (including in the Response to this EOI document) without the prior written consent of the Council.

The Response to this EOI document once submitted becomes the property of the Council and the Council may make additional copies of the Response to this EOI document for its purposes.

Supplier is solely responsible for:

- The accuracy of the Response to this EOI document
- Any costs incurred in the preparation of the Response to this EOI document, supplier presentations, and any other supplier activity that is a part of the EOI process, and
- Ensuring that all applicable legal requirements, laws, statutes, regulations and standards as set forth by any level of governing authority are adhered to in its Response to this EOI document and in its participation in this EOI process

This EOI and this EOI process are not a tender. There is no intention in this EOI or in this EOI process to create a bidding contract, including what is commonly called Contract A, between THE COUNCIL and any supplier, and consequently the Council and supplier are not obligated to comply with any implied terms.

THE COUNCIL reserves the right in its absolute discretion to:

- make changes to its specifications and/or requirements at any time after the release of this EOI and before signing any agreements.
- accept a Response to this EOI document that deviates from the Council 's specifications and/or requirements
- negotiate with one or more or none of the suppliers to modify the Response to this EOI document(s) to best suit the Council's needs
- terminate negotiations with any supplier or this entire EOI process at any time for any reason or any agreements with any suppliers
- reject all or any part of all Response to this EOI documents, without explanation
- accept any Response to this EOI document or Responses to this EOI document it considers advantageous to itself, or any parts thereof and is under no obligation whatsoever to accept the Response to this EOI document with the lowest price
- award business to one supplier or split the business in any manner amongst two or more suppliers
- not award any portions of the business to any suppliers and may subsequently award the business to a supplier and/or a third party should none of the proposed solutions be up to Council's satisfaction.



The information contained in this EOI regarding the Council's current business requirements is supplied as a guideline for supplier and is not guaranteed to be accurate or a commitment regarding future requirements, nor is it necessarily comprehensive or exhaustive.

The final selection of a supplier is subject to approval of the Council's senior management and the execution of an agreement(s) satisfactory to the Council in its sole discretion. The Council has no duty or obligation and shall not be obligated in any manner to any supplier whatsoever until an agreement(s) is duly executed by the Council and the supplier(s), at which point the obligations in such agreement(s) shall apply.

### Confidentiality and Obligations

Confidential Information –the supplier may from time to time have access to confidential information. The supplier agrees that it shall:

1. Hold all confidential information in strictest confidence;
2. Use confidential information solely for the purpose of the procurement activities;
3. Not disclose any confidential information to anyone except for those of the supplier personnel and professional advisors as may be required in order to enable the supplier the procurement activities;
4. Return to the Council all confidential information once it is no longer required for the purpose of performing the services (or destroy such confidential information if so instructed by the Council.
5. Ensure that all of the supplier personnel are aware of and bound by confidentiality obligations which are the same as or stricter than those set out in any other agreement signed by both the parties;
6. Ensure that they comply with such obligations;
7. be liable for the failure of the supplier's personnel to comply with such obligations.
8. The chosen Supplier(s) shall be required to sign an NDA to comply with the Privacy and Security Policy at the Council

The supplier shall refer to the Council all requests for access to, amendment of or deletion of confidential information and any complaints by third parties regarding the handling of confidential information.