Arts Granting Programs Client Care Strategy

REQUEST FOR PROPOSAL
# INDEX

1.0 GENERAL INFORMATION & INSTRUCTIONS ................................................................. 4  
  1.1 PURPOSE FOR THE RFP .................................................................................. 4  
  1.2 ABOUT THE CANADA COUNCIL FOR THE ARTS ........................................... 5  
  1.3 BACKGROUND .................................................................................................. 6  
  1.4 ACCEPTANCE OR REJECTION OF PROPOSALS ............................................... 6  
  1.5 RFP DATES & DEADLINES ............................................................................... 7  
  1.6 CONFIDENTIALITY AND COUNCIL’S OBLIGATION ......................................... 7  
  1.7 TERMS & CONDITIONS .................................................................................... 7  
  1.8 REQUESTS FOR INFORMATION ....................................................................... 8  
  1.9 INSTRUCTIONS ................................................................................................ 8  

2.0 COUNCIL’S REQUIREMENTS ................................................................................... 10  
  2.1 OVERVIEW ........................................................................................................ 10  
  2.2 SERVICE REQUIREMENTS ............................................................................... 11  
  2.3 GENERAL TIMEFRAME REQUIREMENTS .......................................................... 12  
  2.4 OTHER REQUIREMENTS .................................................................................. 12  

3.0 EVALUATION OF THE PROPOSALS ...................................................................... 13  
  3.1 SCORING ........................................................................................................... 13  
  3.2 SHORT-LIST ....................................................................................................... 13  
  3.3 AGREEMENTS WITH SUCCESSFUL FIRMS ....................................................... 13  

4.0 WORK TERMS ....................................................................................................... 15  
  4.1 TASKS ............................................................................................................... 15  
  4.2 CLIENT SUPPORT ............................................................................................. 16  
  4.3 DELIVERABLES AND ASSOCIATED SCHEDULE .............................................. 16  
  4.4 OFFICIAL LANGUAGES...................................................................................... 16  
  4.5 WORK LOCATION ............................................................................................ 16
4.6 TRAVEL .................................................................................................................................. 16

APPENDIX A - PROPOSAL FORMAT .......................................................................................... 17

APPENDIX B – PRICING SCHEDULE, RESOURCES & VALUE ADDED .............................. 20

B.1 PRICING SCHEDULE ........................................................................................................... 20

B.2 KNOWLEDGE, EXPERIENCE AND CAPABILITY .............................................................. 20

B.3 VALUE ADDED ..................................................................................................................... 20
1.0 GENERAL INFORMATION & INSTRUCTIONS

1.1 PURPOSE FOR THE RFP

This request for proposal (RFP) invites Professional Consulting Service Providers (the Firm) with expertise in the development and implementation of Client Care Strategies in the public and para public sector to submit proposals to develop a client care strategy, a toolkit, and an implementation roadmap for the Arts Granting Programs Division of the Canada Council for the Arts (the Council). The Firm will also be expected to provide selected Council staff training on the client care tools which will have been developed.

The past five years has been a period of significant change in how the Canada Council for the Arts supports its clients which is a result of:

- Doubling of the Council’s Parliamentary appropriation over the past five years
- Development and delivering on a series of new funding programs which better reflect the needs of Canada’s artistic community
- Implementation of various digital tools which have resulted in transforming the client’s grant application process from essentially a paper-based process to an entirely digital grant application and acceptance process
- The global pandemic has had a significant impact on its organization as well as our clients which has led to:
  - Roughly 90% of the staff are now working virtually
  - The Council adapting quickly to client needs by providing them with additional funding opportunities through emergency funds that the Council has delivered on behalf of the federal government
  - The introduction of micro grants which result in higher levels of applications which need to subsequently be assessed rapidly with results communicated back to applicants

The Council recently launched its 5-year Strategic Plan Art, Now More than ever it will result in the implementation of a series of new initiatives and funding programs to support the arts sector in a period of unprecedented change. To support these various initiatives, the Council is currently in the process of developing its business requirements for a new Grant Management System as well as a Customer Relationship Management system.

The Council prides itself on the quality of the services it provides to its grant applicants and recipients; this assessment was validated in an external survey which was conducted in 2020. However, it acknowledges that there are a number of gaps and deficiencies which it needs to address if it expects to maintain this high level of client care in this period of significant changes arising as a result of its new strategic plan, in addition to any new initiatives which Council may be asked to lead as part of a broader government post pandemic recovery plan.
The objective of this RFP is to engage a professional services organization who can work collaboratively with the Arts Granting Programs Division to better understand the client care needs of its applicants and grant recipients as well as key arts community stakeholders and the supporting resourcing model and tools to provide the high level of client service in a pragmatic and cost-effective manner. Following this assessment, the selected service provider will work with the leadership team to develop a high level 3–4 year implementation roadmap and a playbook or toolkit.

There is an expectation that the chosen service provider will have a proven track record in helping organizations become more self-sufficient in being able to undertake future client care assessments (Development of Personas, Journey Maps, etc.) by providing the Council with the requisite tools (Questionnaires, Word, Excel, Powerpoint templates which work seamless with the Council’s M 365 Environment) and training to develop additional personas and journey maps, among others, to lead future initiatives with internal team members. The Client Care strategy will be aligned with the Council’s overall communications strategy and tactics.

1.2 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.

Through its arts funding, communications, research, and promotion activities, the Council fosters ever-growing engagement of Canadians and international audiences in the arts.

The Council’s Public Lending Right (PLR) program makes annual payments to creators whose works are held in Canadian public libraries.

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.

For more information in regards to the above-mentioned, please refer to Council’s following websites:

- Canada Council for the Arts: https://canadacouncil.ca/
- Public Lending Right Program: https://publiclendingright.ca/
- Art Bank: https://artbank.ca/
- CCUNESCO: https://en.ccunesco.ca/
1.3 BACKGROUND

The Arts Granting Programs Division, which includes the PLR program, is the Council’s largest division and is responsible for overseeing the entire grant management process which represents on average roughly $300M in grants to artists, groups and organizations as well as payments to Authors and Illustrators.

This represents roughly:

- # of active applicant profiles which are approved prior to submitting a grant application:
  - 50,000
- Number of grant applications received on an annual basis:
  - 2018-19: 12,500
  - 2019-20: 18,000
  - 2020-21: 22,000
- 17,000 authors who receive payments annually through the PLR program
- Since 2017 (to date), the Council has received applications from approximately:
  - 2,000 distinct groups
  - 18,000 distinct individuals
  - 4,000 distinct organizations
- Total External inquiries for 2019 were approximately 12,000
- Total External inquiries for 2020 were approximately 20,000

As the Government of Canada launches its Post Pandemic Recovery Plan, there is a possibility that the Council may play a key role in supporting the cultural sector and these historical volumes may increase.

While the Council continues to make significant investments in technology and human resources, it requires a more comprehensive and integrated approach to how it can continue to improve on the wide variety of services it provides to its clients. The Council also acknowledges that this goal of continuing to enhance our client’s experience will be an ongoing journey and is looking for the Firm to provide the necessary guidance on the potential organization models, tools, templates and processes to lay the foundation for this transformation.

1.4 ACCEPTANCE OR REJECTION OF PROPOSALS

It is the intention of the Council to consider the proposals submitted and to not be precluded from negotiating with one, or more than one, of the parties responding to this RFP to finalize technical and commercial terms. The Council reserves the right to accept any proposal, or any part of a proposal submitted that is deemed, in the sole discretion of the Council, to be the most advantageous to it.

The proposal having the lowest cost shall not necessarily be accepted and the Council may take into account any criteria in evaluating responses to this RFP. The Council is not obliged to provide reasons to any responding parties with respect to any use of the Council’s discretion.

The Council reserves the right, in its sole discretion, to seek further information from, or clarification of, any proposal submitted in response to this RFP, and is entitled to utilize any such information or clarifications received in deciding which proposal it may accept, if at all.
1.5 **RFP DATES & DEADLINES**

The following schedule will be followed for this RFP:

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP posted to MERX</td>
<td>May 31, 2021</td>
</tr>
<tr>
<td>Deadline for questions regarding the RFP</td>
<td>June 7, 2021</td>
</tr>
<tr>
<td>Deadline for submissions</td>
<td>June 22, 2021</td>
</tr>
<tr>
<td>Contract negotiations</td>
<td>July 12, 2021</td>
</tr>
<tr>
<td>Start of contract</td>
<td>July 26, 2021</td>
</tr>
</tbody>
</table>

**Period of Validity of the Proposal**: Proposals submitted must remain open for acceptance by the Council for a period of not less than sixty (60) days from the specified closing date.

1.6 **CONFIDENTIALITY AND COUNCIL’S OBLIGATION**

All information, including the RFP, provided to the Firms shall remain the exclusive property of the Council. As such, all data and information shall be kept strictly confidential and shall not be disclosed to any third party without the express written consent of the Council.

The issuance of this RFP and Council’s receipt of any proposal shall not, in any manner, obligate Council to perform any act, incur any liabilities, or reimburse or compensate any Firm for preparation costs or other losses incurred in the preparation of their response to this RFP. Council shall have the right to use, for any purpose, any information submitted in connection with the RFP unless it has been marked Confidential.

Confidentiality agreements or clauses are subject to the *Access to Information Act* s. 20(1)(b) and must meet the following four conditions to be treated confidentially.

The information must be:

1. financial, commercial, scientific or technical information;
2. “confidential” - three indicators of confidentiality:
   - the information contained in the record is not available from other sources in the public domain or obtainable by observation or independent study by a member of the public acting on his or her own;
   - the circumstances in which the information originates and is communicated give rise to a reasonable expectation that it will not be disclosed; and
   - the information, whether provided by law or supplied voluntarily, is communicated to the government within a relationship that is either fiduciary or not contrary to the public interest and that will be fostered for the public benefit by confidential communication.;
3. supplied to a government institution by a third party; and
4. treated consistently in a confidential manner by the third party.

1.7 **TERMS & CONDITIONS**

Successful firm(s) will be required to enter into a [Contract Agreement] with the Council which will embody the terms of this RFP and any subsequent negotiations or clarifications. The Council reserves the right to modify or amend this form of agreement prior to its finalization and execution with the party submitting the successful proposal.
1.8 REQUESTS FOR INFORMATION

Please submit any questions in writing, via email, to the contact below and the Council will respond accordingly. To ensure that all firms receive equivalent information, the Council will post applicable clarification questions and responses on MERX. Deadline for submitting questions is June 8, 2021 at 5:00 pm EST (Ottawa local time).

Enquiries concerning any aspect of this RFP can be directed to:

Contact Name: Donald Belanger
Contact Title: Manager – Granting Program Operations – Financial Management & Special Projects
Email: donald.belanger@canadacouncil.ca

1.9 INSTRUCTIONS

1.9.1 INTENTION TO REPLY TO RFP

Please reply via email (address in section 1.8) that you have reviewed this RFP and of your intention to submit a proposal by June 15, 2021. A return email address must be shown in the proposal.

1.9.2 RECEIPT OF PROPOSAL

The completed RFP submission shall be received electronically by email on the proposal due date of June 22, 2021 prior to 5:00 pm EST (Ottawa local time). Firms are requested to keep their RFP submission size to under 20 MB. Please indicate the RFP title in the email’s subject line.

All proposals must be:

1) signed by a duly authorized officer;
2) include a statement that the Firm has examined and understood the RFP and all addenda (as applicable), and
3) state that the Firm has the technical and financial resources and personnel to provide the services as identified in this RFP, and within the timeframes specified in this proposal.

Consulting firms are responsible for ensuring that submissions are received by the Council prior to the proposal due date and time. Late submissions received after the closing date and time will be disqualified from competition and not evaluated.

1.9.3 FORMS OF PROPOSAL

To ensure that all proposals are uniformly evaluated, they must be submitted in the format prescribed in Appendix A of this RFP.

The proposal should completely address each element of the Council’s requirements as outlined in Section 2.2 (Service Requirements). Changes or enhancements should be clearly identified and explained. The Firm may suggest alternative means beyond the scope of the stated requirements.
1.9.4 MODIFICATION OF PROPOSALS

Firms may modify their proposals up to the specified closing date and time.

1.9.5 AMENDMENTS OR WITHDRAWAL OF THE RFP

Correction or clarification to the RFP will be issued in the form of a written addendum to the RFP and will be posted on MERX. No interpretation, correction, clarification or amendment to the RFP shall be binding on the Council unless it is by way of an addendum. Firms must acknowledge receipt of all addenda in their proposal.

1.9.6 RETURN OF PROPOSALS

Unsuccessful proposals will not be returned to the Firm.
2.0 COUNCIL’S REQUIREMENTS

2.1 OVERVIEW

Historically, the Council’s approach to supporting grant applicants and recipients (the clients) was a very personal one where there was an expectation, both from the client and from Council personnel, that a 1:1 business relationship existed between both parties where the client could contact their program officer to:

- Solicit input / validation with respect to potential project initiatives
- Seek assistance on how to structure / respond to granting initiatives
- If unsuccessful, obtain feedback as to why they were unsuccessful and how they can improve on future grant applications

With the change to the Council’s programs to a non-disciplinary model, the doubling of the Council’s Parliamentary appropriation over the past five years, and the recent influx of additional emergency funding, combined with the implementation of the Council’s Portal to process grant applications, this client care model is no longer sustainable due to the significant increase of volume which the division is dealing with.

Despite market research which indicates that most individuals want to leverage various self-service technologies (Client Relationship Management, Artificial Intelligence, Chat Bots, Self Service, etc.) a recent Arts Granting Program Division client survey (conducted in 2020) of roughly 1,800 of the Council’s applicants and recipients indicated that there is still a strong desire by its clients to continue with this more personalized client care model.

Within the Arts Granting Programs Division, clients are supported by:

- General Information, Guidelines, FAQs which can be accessed via the Council’s web site
- Dedicated Operations Officers who respond to client inquiries via telephone or via email

Program Officers who deal with specific inquiries related to program objectives, eligibility, and assessment criteria. As previously referenced in Section 1.3, in 2020 these team members responded to roughly 20,000 external client inquiries, all of which were logged in a variety of spreadsheets requiring a significant effort to log and track these client interactions.

While the Council has successfully delivered on its commitments as a result of the doubling of its budget over the past years as well as some additional funding to counter the effects of the pandemic, it also has been very aggressive in transitioning the way it does business by developing and executing on a multiyear digitization program which is changing the way it delivers its services to both its internal and external clients. Over the past three years the primary focus of its Digital Shift has been:

- Corporate wide digital shift initiatives which includes transitioning to M 365 for its office productivity tools, collaborative tools and document management
- Implementation of a Cloud Based ERP solution which includes core financials, Human Resources and Payroll
- Increasing functionality in a self-serve portal for applicants throughout the granting cycle from selecting programs and submitting applications to accepting and reporting on awarded grants which also includes on line assessment as well as grant reporting

Additionally, the communication needs of grant recipients have been noted and represented in an overarching strategy for the public website (canadacouncil.ca) and well in assessments of other public communications platforms including email marketing and social media. Findings and strategy
The Council is now focused on determining its business requirements and developing a business case which will result in the implementation of a new Customer Relationship and Grant Management System which is anticipated to begin within the next 12 to 18 months.

There is an expectation that some of the findings and recommendations of this Client Care Strategy will feed into these systems’ business requirements.

As part of this initiative, there is a requirement by Senior Management to embark on a multiyear journey to enhance the client's user experience while ensuring that the cost to provide these services do not continue to increase or put undue pressure on internal staff. Leveraging the Council's current platforms and communication strategies and tools will also be a goal.

The Council wishes to engage a firm with the requisite qualifications, expertise and proven track record to work in a collaborative manner to aid in the development of:

- **Art Granting Program Division's Client Care Goal** – Alignment on the aspirational goal for the Arts Granting Programs Division client experience. How will we know when we are successful? What will it look like? How will it feel? What the 4 -5 key performance indicators and how will data be captured to measure those?

- **Client Care Maturity Model** which assesses the Arts Granting Program Division across multiple dimensions against our long-term client care vision.

- **Client Segments/Needs/Journeys** – Build upon data/insight/information from past client interactions and research to further understand CCA’s most critical 4-6 client segments and their needs (and develop personas), identify their current vs. the ideal client journeys including all touchpoints which will subsequently result in identifying the 2 – 3 key critical moments that matter most (“moments of truth”).

- **Enablers** – Identify what concepts/solutions are required to satisfy client needs, and required enablers (people, process, technology and data).

- **Roadmap** - Develop high-level initiative roadmap (3-4 years) outlining explicit actions to be taken to realize the goals.

- **Knowledge Transfer** - Develop playbook/blueprint for Arts Granting Programs Division, so we can repeat the process of developing personas and journey maps in the future.

### 2.2 SERVICE REQUIREMENTS

The Council requires a comprehensive client care strategy and a 3–4-year High Level Implementation Roadmap as outlined in Appendices A and B. Firms must clearly demonstrate, with examples and references, their experience and expertise in Client Care Assessments, Strategic Planning and successful execution.

Having completed an extensive client survey in 2020, the Council does not want to embark on another survey of its clients which will be made available to the Firm. The Council’s project team will work closely with the selected service provider to organize internal working sessions with key resources within AGP which will include some targeted interviews with a variety of clients.

Firms must provide details of their:

- **Approach and methodology**: The steps the Firm takes to assess and address client care requirements, including their approach to problem solving.
• **Work plan and timeline:** The specific steps and deliverables the Firm plans to provide with timelines for each.

• **Similar experience:** Examples of comparable projects where the Firm has delivered on a Client Care Strategy for a public sector organization, preferably one which provides financial assistance or grants to Canadian Citizens or organizations. This section should be limited to 3 examples of similar projects with key outcomes/results and these project summaries should be limited to no more than 2 pages each.

• **Team members and associated fees:** Team members, their resumes, rates and capacity to provide services in both official languages.

• **Dependencies:** Any resources required from the Council to carry out the work. The Council will have approval of any materials utilized in the process (i.e. Interview Guides etc..) and will be responsible for the translation of all key documents / deliverables into the other official language.

Firms must also demonstrate a strong understanding of:

• The Council’s industry, culture and work style and describe how that knowledge will be used to foster effective change.

• The extent of the disruptions caused by implementing client care changes with respect to processes, new technologies or roles and responsibilities and the difficulties staff will encounter adjusting to changes in their work and describe how it will address related difficulties encountered while carrying out its client care strategy work.

Other Considerations

• The budget for this project has been set for $70,000

The Council wishes to retain the option to extend this contract to potentially provide further advisory services to other divisions within the organization which also may further training workshops and coaching. Firms should provide a fee structure by resource level for these additional sessions.

---

### 2.3 GENERAL TIMEFRAME REQUIREMENTS

Exact timelines will be defined with the successful Firm. However, the following general timeframes are being planned for as follows:

- **August 2021** – Planning & Scoping including High Level Workplan
- **September 2021** – Preliminary Findings & Client Care Maturity Assessment Model including working session with AGP Senior Leadership Team.
- **October 2021**
  - Client Care Tools, Templates
  - Development of 4 Client Personas, Journey Maps and High-Level Business Processes
  - High Level Client Care Technology Requirements
- **November 2021**
  - Training of selected Arts Granting Programs Division staff on Client Care Tools & Templates
  - Deliver Client Care Strategy & Implementation Roadmap
  - Project Wrap Up

---

### 2.4 OTHER REQUIREMENTS

No other requirements.
3.0 EVALUATION OF THE PROPOSALS

3.1 SCORING

All proposals will be rated on the basis of a "points earned" matrix that will involve an analysis of the complete proposal including, but not limited to, such areas as:

- Proposal is submitted according to instructions (Pass/Fail)
- Firm's capability (70%)
  - Section A: Executive Summary of the Proposal
  - Section B: Profile of the Firm
  - Section C: Suitability of the Firm
  - Section D: Service Requirements
  - Section E: Service Standards
  - Section F: References
  - Section G: Timeline Requirements
- Firm's pricing schedule (30%)
  - Section H: Pricing Schedule, Experience & Value Added
  - Appendix B

Firms are required to demonstrate in their proposal that they are able to satisfy the above criteria. Council reserves the right in its sole discretion to request, in writing or orally, clarification of any additional information concerning proposals that are considered responsive.

3.2 SHORT-LIST

A short-list of Firms will be selected on the basis of Council's analysis. Firms on the short-list will be notified in writing and Council reserves the right to request a one-hour presentation to the Council's Selection Committee.

The Council retains complete discretion in deciding which proposals meet the requirements set out in the RFP and what evidence will be considered adequate to indicate compliance with those requirements.

3.3 AGREEMENTS WITH SUCCESSFUL FIRMS

The Council shall enter into negotiations with the successful Firm(s) with a view to finalizing a Contract Agreement (the contract), on terms acceptable to the Council. The contract shall be for a period of one base contract year, with the option of a one-year extension in favour of the Council. The Council reserves the right to cancel the contract at any time if the service does not meet Council's expectations and a 30-day advance notice will be sent.

If an agreement acceptable to the Council is not reached within sixty (60) days after selection of the successful Firm, the Council may disqualify that Firm and re-evaluate the remaining proposals without obligation or claim against the Council.

All proponents will be advised on the results of the RFP, including disclosure of the name of the winning proponent, once the proposals have been reviewed and the final negotiations with the winning proponent have been finalized and agreed. Notifications will be done via an email and/or telephone conversation.
with all the proponents at the discretion of the Council. Within 15 days after notification of award, unsuccessful proponents may request a debriefing on their proposal to be scheduled at a later date.
4.0 WORK TERMS

4.1 TASKS

The Client Care Consulting Firm will address the Arts Granting Programs Division’s processes, technologies and people with respect to Client Care. This includes but is not limited to:

- **Assessing** the Arts Granting Programs Division’s Client Care Maturity in terms of people, processes and technologies (i.e., Scale from 1 to 5, with the corresponding definitions for each level). This Client Care Maturity Model will be a key tool for management to continually self-assess itself as it implements its long-term strategy. Once developed, the chosen service provider will present an initial version of the Maturity Model during two Senior Management working sessions to ensure that there is senior level alignment as to what is reasonable to achieve in Council within the next 3 to 4 years.

- **Development** of Client Care Tools and Templates which can be leveraged to guide Arts Granting Programs Division staff in developing Client Personas, Journey Maps and High-Level Process Maps to support future work.

- **Leveraging previously** referenced tools, the Firm will work with the Arts Granting Programs Division team members to develop 4 Client Personas, Journey Maps and high-level client care processes.

- **Conducting 2** training sessions to a broader Arts Granting Programs Division audience on the developed Client Care Tools and Templates

- **Determining** high level Client Care Technology requirements (i.e. CRM, Chatbots, Intelligent Call Routing, etc.) which would be appropriate for the Council which would subsequently be included in future Enterprise-Wide CRM business requirements.

- **Development** of a 3 to 4 Year Client Care Implementation Roadmap. With the new CRM and Grant Management Solution not being fully implemented for 2 or 3 years, the first 12 to 18 months of the Roadmap should highlight quick wins which can be reasonably implemented without leveraging the technical capabilities of these new enterprise-wide solutions.

The Council acknowledges that Firms have their own Client Care Strategic Planning and Implementation methodologies, therefore, the description of services above is meant only to provide examples of tasks that the Council expects a successful bidder to carry out.

All components of this Client Care project must address all affected staff of the Arts Granting Programs Division.

It is anticipated that approximately 20 per cent of the Client Care activities will focus on gaining leadership buy-in and alignment on the changes required, and 80 per cent of activities will consist of day-to-day activities of designing and implementing client care initiatives including any required staff training.

The Arts Granting Program Division Senior management training must cover the meaning and responsibilities inherent in implementing an integrated Client Care Strategy.
4.2 CLIENT SUPPORT

The Council’s Project Authority will:

- Provide overall project management authority;
- Provide the Firm with background documents for review;
- Assist the Firm with obtaining Council documents and data, when required;
- Will be the source of final approval and acceptance of all deliverables; and
- Provide feedback to the Firm on all deliverables.
- Be responsible for the translation of all key working documents and final deliverables.

4.3 DELIVERABLES AND ASSOCIATED SCHEDULE

Deliverables can include project work plans, findings assessment reports, process documentation and other related deliverables.

- August 2021 – Planning & Scoping including High Level Workplan
- September 2021 – Client Care Maturity Assessment Model.
- October 2021
  - Client Care Tools, Templates
  - Development of 4 Client Personas, Journey Maps and High-Level Business Processes
  - Training of ARTS GRANTING PROGRAMS DIVISION staff on Client Care Tools & Templates
  - High Level Client Care Technology Requirements
- November 2021 – Deliver Client Care Strategy & Implementation Roadmap

4.4 OFFICIAL LANGUAGES

Work, including tasks and deliverables, will be primarily completed in English; however, the team must be capable of providing services in both official languages, especially for conducting meetings.

4.5 WORK LOCATION

The work shall be carried out primarily virtually or at the offices of the Council, should CCA have returned to work at our premises located at 150 Elgin.

4.6 TRAVEL

No travel outside the NCR will be required. Travel within the NCR will not be reimbursed.
APPENDIX A - PROPOSAL FORMAT

To ensure that all proposals are evaluated equally, the submissions must be divided into the following sections:

SECTION A  AN EXECUTIVE SUMMARY OF THE PROPOSAL

SECTION B  A PROFILE OF THE FIRM

This section should include:

- company legal name and Canadian address;
- contact information for person responsible for RFP submission;
  - Name, Title, Phone, E-mail
  - Authorized Signature and Date
- website;
- professional memberships;
- number of years in business as a Professional Services firm in Canada;
- number of core clients;
- financial capacity;
- geographical area of operation;
- a brief description of your company, including the number of FTEs (employees versus contract personnel), average length of employment, an organizational chart and a brief resume of each senior manager.
  - Provide details that would be specific to this engagement

SECTION C  SUITABILITY OF YOUR FIRM

This section should describe in two pages why you feel that the Firm is best suited to serve the Council’s client care requirements.

Please describe what work the Firm has done in terms of providing client care consulting services with (a) Crown corporation(s), or (b) similar type of agencies and/or organizations, and (c) with organizations working in the arts and culture sector. A demonstrated knowledge and understanding of the arts and culture sector will be a bonus.

The Firm must be able to demonstrate experience in providing advisory services for similar corporations and agencies and should demonstrate both Canadian and Global reach. The Firm should be able to demonstrate their understanding and needs of the arts sector, including Indigenous, racialized, Deaf and disability, and Official Language Minority communities, among other underserved communities.

A description (500 words), of the Firm’s approach to diversity and inclusion and their commitment to reflecting the diversity of their community within their team, including gender diversity, representation of Indigenous Peoples, Black and racialized people, people who are Deaf or have disabilities, and official language minority communities.
Note: organizational applicants/bidder should not disclose personal information for their employees in their response

SECTION D  SERVICE REQUIREMENTS

This section should be broken into sub-sections that respond to each of the requirements identified in the Council's Service Requirements (2.2) of this RFP. The Firm must provide project summaries describing at least three (3) engagements related to each project/service/requirement completed in the past three (3) years and must show experience and qualifications with similar corporations and agencies. The Firm must demonstrate qualifications for each of the requirements and articulate what value they brought to their client through the delivery of that service. The Firm must demonstrate experience in providing Client Care Strategy Development and related advisory type of services.

SECTION E  SERVICE STANDARDS

This section should describe the Firm's approach, methodology and accelerators for managing and delivering on project engagements of this nature (based on the examples identified in Section D).

This section should also address the following:

- Firm's ability to provide a highly personalized, responsive and practical service, and meet established project deadlines;
- Firm's proposal for problem resolution if the proposed work is unsatisfactory;
- Firm's ability to provide a high level of service to Council in both official languages.

SECTION F  REFERENCES

Please provide five references of comparable, existing corporate clients including the names of the senior contacts, phone number and email. Summarize the work that was done for their organization and the year(s) the service was provided. At a minimum, three of these references must come from Government of Canada departments, agencies or Crown Corporations. Private sector references may also be provided in addition, if desired.

SECTION G  TIMELINE REQUIREMENTS

This section should describe the Firm's ability to meet the timeframes indicated in Section 2.3 and demonstrate availability and capacity to deliver on the Council's service requirements in the timeframe requested.

SECTION H  PRICING SCHEDULE, RESOURCES & VALUE ADDED

This section should state the total value of the contract and outline the rates for services for each resource category (see Appendix B for the roles). Resumes must be provided for each of the roles to demonstrate the Firm's breadth of experience and availability of these resources to immediately start work on the proposed requirements.

Indicate whether your Firm would provide thresholds for pricing influenced by spending or if any additional incentives such as early payment terms or grouped project discounts could apply.
Describe any other value added services that your Firm could provide. Explain where there would be any additional financial advantage if your Firm was awarded work.
APPENDIX B – PRICING SCHEDULE, RESOURCES & VALUE ADDED

As a requirement to complete the Proposal, a pricing schedule must be included for this initiative as well as the additional services which the Council may wish to contract for as previously stated in Section 2.2.

B.1 PRICING SCHEDULE

To ensure that all proposals are evaluated equally, please provide a rate for each of the roles identified below:

<table>
<thead>
<tr>
<th>Role</th>
<th>/Hour</th>
<th>Daily Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: If additional roles would be required to provide the services requested by the Council, list the role, rate and provide a description of the expected need for that type of resource.

B.2 KNOWLEDGE, EXPERIENCE AND CAPABILITY

It is important to the Council to have competent resources who have been dedicated by their Firm to work with the Council. Describe the resources, including their knowledge, qualifications and experience to provide the services required by the Council. Please provide resumes for each of the roles identified above.

B.3 VALUE ADDED

Indicate whether your Firm would provide thresholds for pricing influenced by spending or if any additional incentives such as early payment terms or grouped project discounts could apply.

Describe any other value added services that your Firm could provide. Explain where there would be any additional financial advantage if your Firm was awarded work.