



Canada Council  
for the Arts

Conseil des arts  
du Canada

**Standing Offer – Request for Proposals:  
Customer Relationship Management and Data Analytics  
Professional Services and Expertise**

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## A. STANDING OFFER: ADVISORY & CONSULTING SERVICES FOR THE CANADA COUNCIL FOR THE ARTS

### General Provisions

The purpose of this Standing Offer (SO) is to add suppliers to the existing list the Canada Council can call upon for **consulting services** to support the development and the implementation of the Council's *Customer Relationship Management and Grant Management System*.

A Standing Offer Agreement is an arrangement to provide goods and services at prearranged prices with set terms and conditions, for specific periods of time on an "as requested" basis. A Standing Offer is not a Contract and an Order against a Standing Offer is a "Call-up". Each Call-up is a separate Contract between the Council and the prequalified supplier.

Public corporations, small businesses and independent professionals (freelancers), offering the above-mentioned services may apply for inclusion on this list.

### 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 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 the new Customer and Grant Management System (CGMS)

The Council has launched a project to implement an integrated Customer Relationship Management and Grant Management System (CGMS) from 2021 to 2023, to support the modernization and transformation of the Council's granting processes and client relationship management, and to improve its strategic capacity and core business capabilities.

More precisely, CGMS has the objectives of supporting the effectiveness of funding opportunities in achieving their intended outcomes, streamlining workflows and accelerating processes related to granting programs delivery, elevating the user experience throughout the granting lifecycle, and improving data and analytics capacity to drive business decisions.

Leveraging advanced capabilities that are enabled by cloud-delivered applications and platforms, the scope of CGMS includes the modernization of the end-to-end granting management lifecycle (from arranging, applying, assessing, awarding, reporting and auditing).

This Request for Proposal is to identify individuals service providers who have the requisite expertise and experience to support this key strategic project.

## B. INFORMATION FOR SUPPLIERS

### Submission of Proposals

Suppliers must submit their proposals no later than **August 10, 2022 at 5 p.m. (EST)** (Ottawa local time) by email, mentioning the Standing Offer (SO) in the subject line.

Any questions regarding this SO shall be submitted in writing, via email, and the Council will respond accordingly. Deadline for submitting questions is **July 28, 2022 at 5:00 p.m. EST** (Ottawa local time). To ensure that all firms receive equivalent information, the Council will post applicable clarification questions and responses on MERX and the Council's website (<https://canadacouncil.ca/about/requests-for-proposals>).

The following schedule will be followed for this Standing Offer RFP:

Publication of Standing Offer RFP	July 21
Deadline for questions regarding the Standing Offer RFP	July 28
Deadline to respond to questions regarding the Standing Offer RFP	August 3
<b>Deadline for submissions</b>	<b>August 10</b>
Additional information requests from short-listed Firm(s) if required	August 17
Contract negotiations	August 22
Start of contract	September 6

**For any information and questions about the Standing Offer, please contact:**

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Canada Council for the Arts

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## **Form of Proposal**

To ensure that all proposals are uniformly evaluated, they shall be submitted in the format prescribed in **Appendix 1. Your proposal must be no longer than nine (9) pages, excluding the information requested in Appendices 1, 2 and 3.**

All proposals must be signed by a duly authorized officer and include a statement that the supplier has examined and understood the SO and accepts the conditions contained therein.

The proposal must state that the supplier has the technical and financial and human resources to provide the services as identified in this SO, and within the timeframes specified in this proposal.

## **Acceptance or Rejection of Proposals**

The Council reserves the right to reject any or all proposals or to accept any proposal at its discretion.

Proposals will not be read prior to the specified closing date and time. Any proposals received after the specified closing date will be discarded.

## **Modification or Withdrawal of the Request for Proposals**

Suppliers may modify their proposal up to the closing date of the competitions specified.

Any correction or clarification relating to the request for proposals will be published in the form of an addendum and sent to all concerned suppliers. No interpretation, correction, clarification or modification to the request presented in any form other than an addendum shall engage the Council. Suppliers must acknowledge receipt of all addenda in their proposals.

## **Period of Validity of 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.

## **Period Covered by the Standing Offer**

This Standing Offer will begin on September 6, 2022 and end on March 31, 2025, with the option to renew for two additional two years.

## **Ability to bid on future Request for Proposals**

Suppliers who are selected to enter into this SO with the Council will not be precluded from bidding on any other public Request for Proposals which the Council may issue during the duration of their contractual agreement with the Council.

## **Confidentiality and Council's Obligation**

All data and information provided to the supplier, including the SO 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 or reused without the express written consent of the Council.

Furthermore, the copyright of analysis and reporting produced, including their corresponding data, texts, tables, charts and calculations shall be property of the Canada Council, and the supplier will have no right to reuse them.

The issuance of this SO 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 supplier for preparation costs or other losses incurred in the preparation of their response to this SO. The Council shall have the right to use, for any purpose, any information submitted in connection with the SO unless it has been marked Confidential.

## **Evaluation of Proposals**

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:

- Pricing (15 points);
- Ability to provide highly personalized, responsive, efficient and practical services in both official languages (5 points);
- Ability to produce high quality, comprehensive, advisory, facilitation and consulting services related to business transformation (30 points);
- Ability to produce high quality and insightful critical analysis (30 points);
- References for Service Provider has provided these services in the public and private sector. We are only requesting a subset of past clients (15 points).
- Experience in arts and cultural sector is an asset (5 points).

## **Extent of the Obligations of the Canada Council for the Arts**

This invitation to submit a proposal as supplier and the Council's receipt of that submission in no way obliges the Council to offer work to a supplier, nor does it entitle the supplier to receive work from the Council.

The Council retains full decision-making authority regarding proposals that respond to the requirements laid out in the Standing Offer and regarding evidence demonstrating the respect of these requirements. As well, the Council reserves the right, at its sole discretion:

- to suspend the standing offer at any time;
- to negotiate with none of the suppliers who have submitted proposals;
- to ask, orally or in writing, for clarifications regarding any additional information concerning proposals judged to be adapted to its needs.

## **Requests for Service or Requests Subsequent to the Standing Offer**

The Canada Council shall provide the supplier with the necessary data and information<sup>1</sup> (by email, USB key, and/or other data sharing tools), including the documentation and information required for the work, delivery dates and a description of the work, to permit the supplier to determine whether it can accept and process the work requested within the deadlines specified by the Canada Council.

The characteristics of each project and expertise will be defined in coordination with the supplier for each request of service subsequent to this Standing Offer.

## **C. REQUIREMENTS FOR PROFESSIONAL ADVISORY AND CONSULTING SERVICES**

### **1. GENERAL CONSIDERATIONS**

#### **Quality of Work, Response Time and Respect for Deadlines**

It is expected that all suppliers offering consulting services to the Canada Council will provide these services in a timely manner, with the highest possible level of accuracy and quality. To this end, suppliers are expected to verify the quality of their own work before delivering the finished product to the Canada Council. The Council may choose to refuse a deliverable or not pay for the delivered services if the work is considered to be poor quality (incomplete; unsubstantiated findings or methodological issues; numerous typographical, syntax, calculation or analytical errors; work that requires extensive revision by the Council).

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<sup>1</sup> All selected suppliers will be required to sign a contract in which both parties agree and recognize that all Intellectual Property Rights, including any software, documentation, drawings, data, information, database or product provided by the Canada Council, or created or produced by the Offeror, in performing the Services requested will be the exclusive property of the Canada Council. As such, all data and information shall be kept strictly confidential and shall not be disclosed to any third party or reused without the express written consent of the Council.

Suppliers must provide quality assurance for their own work – they must review their deliverables and reporting and all documents before submitting the completed work to the Canada Council.

Requests for projects will be sent to suppliers by email and suppliers are expected to indicate interest by email for any request from the Council within 5 working days following the request (normal hours of work). Once a job is accepted, the supplier must respect the required deadline.

### **Technical, Operational and Organizational Environment**

Suppliers must be able to share electronic documents in Microsoft Office (xls, csv, doc, ppt, etc.), or other software used during the development of each project, as requested by the Canada Council.

### **Location of Work Site and Delivery**

Suppliers are expected to work from their own locations and communicate with the Canada Council by phone, video conference and/or by email. All completed work is to be delivered to the Canada Council in electronic format via email or electronic file transfer.

### **Confidentiality**

The supplier must ensure the confidentiality of all data, files, and texts assigned to them.

### **Special Requirements**

The Canada Council will describe any special requirements of the work on the request for service. Suppliers must seek approval for any surcharges or additional costs (above and beyond those identified in the *Rates and Services Grid*) prior to commencing work on any such request. Suppliers must also notify the Council staff if they expect any delays or upsets due to the special requirements.

## **2. SCOPE OF SERVICES**

To support the Council's ***Customer Relationship Management and Grant Management System*** development and implementation, the Council is seeking consulting services or individuals who have a proven track record in providing services in the areas listed below:



1. **Customer Relationship Management (CRM) Business Expertise Specialists** are roles that provide expert knowledge of CRM system development and implementation in the context of a public or not-for-profit organization. These roles will work closely with the CRM Product Owner to coordinate work teams that will drive detailed configuration and process decisions. They will coordinate working groups formed of Subject Matter Experts (SMEs) on the Council's granting and non-granting business (Art Bank, Prizes, Communications, Partnerships, Research and data analytics), to gather, synthesize and get validation for business requirements related to the development and implementation of the new CRM system. These roles will contribute to the development of the project scope, objectives and success criteria and coordinate project progress within those parameters for non-granting activities. They will provide status reports, review issues, make recommendations; develop work-around processes resulting from deferred requirements; contribute to the development and delivery training modules related to the project; support the CRM Product Owner in the prioritization of development work, prepare briefing notes for decision-making, coordinate communication strategies, and undertake other tasks related to Customer Relationship Management (CRM) activities.

The specific roles and responsibilities of these two roles will be defined based on selected consultants.

2. **Data Architect and Analyst** to support the development and implementation of, and the transition to the new Council Customer Relationship Management and Grant Management System (CGMS). This role analyzes, evaluates and reports on the data architecture related to CGMS (including but not limited to data model, standardization, migration, exchange); recommends, conducts and monitors data collection, undertakes validation and dissemination projects and processes for the Canada Council; develops and maintains corporate data sets used for corporate reporting and granting/non-granting program performance measurement; designs visualizations (including charts and graphs) using best practices and tools for data visualization; provides advice and proposes implementation of best practices in data intelligence; assists and supports in the management and development of performance measurement indicator methodologies and tools related to CGMS; provides assistance to granting and non-granting staff related to data architecture, collection and validation methodologies; and performs other related duties.
3. **Procurement Specialist** to provide support on procurement and contracting services. This role will help to review the Statement of Work and evaluation process of different vendors related to the CGMS project; prepare Procurement Plans and Risk Assessments; create and participate in procurement working group to develop procurement strategies; draft solicitation documents such as Requests for Information, Request for Quote; outline agreements and coordinate activities with potential providers; support procurement authorities with contracts; review invoice and supporting documents; and perform other related duties.

Respondents are free to bid on any of these categories. Each category will be scored independently, therefore ensuring that organizations which bid on only one (1) category will not be disadvantaged.

Suppliers who are selected to enter into this SO with the Council will not be precluded from bidding on any other public Request for Proposals which the Council may issue during the duration of their contractual agreement with the Council.

## 4. ROLES AND RESPONSIBILITIES

### **The Council**

The Council will ensure that appropriate subject matter experts from its staff and consultants are available to the supplier(s) to discuss and provide content material, as well as facilitate cooperation with other Council staff, representatives or stakeholders, as required. If required, the Council will also provide the supplier(s) with access to on-site Council facilities and/or workspace, subject to prior written authorization.

### **The Supplier(s)**

The supplier(s) will be responsible for fulfilling the deliverables specified within each individual Project Authorization, providing the Council with regular reports on progress, respecting agreed deadlines and budget, and delivering work that is methodologically sound, of high quality and in conformance with professional standards.

### **Meetings**

The supplier(s) will be expected to meet in person or be available for virtual meetings, with Council representatives and other stakeholders, at the beginning of each Project Authorization. The supplier(s) will be expected to attend meetings in person or participate through virtual meetings at key milestones of the project which would involve providing written project status updates, tabling and discussion of draft deliverables and recommendations. The Council's workforce is currently working remotely but expects to transition to a hybrid model by the end of 2022.

### **Deliverables & Schedules**

Specific deliverables will be detailed in each individual Project Authorization and may include: reports, presentations, surveys, related working papers, assignment planning memoranda, and other related services.

All graphs, tables, charts and infographics must be produced by the supplier(s) in English and formatted for accessibility for the final version of the report. Translation of the text body of the final report will be performed by the Council. All data ready for

publication as Open Data must be provided in English and French, in XLS or CSV format.

All sensitive data collected on behalf of the Council, that has been identified as Protected B (personal information), must be stored in a computing facility located within the geographic boundaries of Canada. Service providers must ensure the storage of data is within boundaries of Canada. When the data physically resides in Canada, it is subject to the protections afforded by Canadian privacy laws and the Council will be better situated to take prompt action, for example, in the event that access to data is compromised. Keeping data resident in Canada is also important for safeguarding sensitive information.

The supplier(s) should demonstrate that they have the capacity for privacy and security procedures that are monitored and enforced. Also, the supplier(s) should have mandatory and ongoing privacy, confidentiality and security training for all individuals and/or team members including those at external collaborating or subcontracting sites.

The Council standards shall be respected when conducting data collection on behalf of the Council, in addition to relevant laws, regulations and policies, including the European Union standards related to privacy and access to information.

## APPENDIX 1

### Proposal Format

#### Part A: Summary of Proposal (maximum 2 pages)

#### Part B: Service Provider Information (maximum 5 pages)

The following information must be provided with the supplier's application to be considered for inclusion in the Canada Council list of pre-qualified suppliers:

- a) Information about the supplier's business status: nature of the business (e.g., incorporated, partnership, self-employed), business number and GST number, if applicable;
- b) Contact information (including web site and email addresses);
- c) Years of experience and/or date of incorporation;
- d) Commitment and examples of providing advisory services in the Public Sector, both in Canada and internationally
- e) List of relevant similar projects, as well as references or testimonials from past or current projects;
- f) Capacity to provide services in both of Canada's Official Languages;
- g) Existing Methodologies & Toolkits which can be leveraged during delivery of advisory or consulting services
- h) Service Provider's commitment to promoting and supporting Equity, Diversity and Indigenous communities  
A description (200 words), of the supplier'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/bidders should not disclose personal information for their employees in their response.*
- i) Quality assurance statement: The supplier must provide a description of how it ensures the quality and accuracy of its work;
- j) Service Offerings for Considerations
- k) Proposed Service Offerings (Appendix 2) duly completed
- l) The *Rates and Services Grid* (see Appendix 3) duly completed.

#### Part C: Suitability of the Service Provider (maximum 2 pages)

In this section, the supplier should explain the reasons for which it feels it is best suited to respond to the Council initiative in areas that are suited to your expertise and interest.

## APPENDIX 2

### Proposed Service Offerings

Service Offering	Customer Relationship Management (CRM) Business Development Lead and Business Expertise Specialist	Data Architect and Analyst	Procurement Specialist
Able to Required Services (Y/N)			
Supporting Framework & Methodologies			
Approximate Number of Professionals in this Service Line (if Organization)			
Canadian Public Sector Reference #1			
Canadian Public Sector Reference # 2			
Public or Private Sector Reference # 3			
Public or Private Sector Reference # 4			

## APPENDIX 3

### Rates and Services

This Rates and Services Grid must be completed by the supplier as part of its application to be included on the list of pre-qualified suppliers. Please indicate rates only for services in subject areas that are relevant to your expertise and interest.

Should the suppliers have different rate structures by Proposed Service Offering, they are free to propose a different rate structure by individual service offering.

When proposing on a Project Related Statement of Work, suppliers will have the option to utilize this rate card and still bid on a Fixed Fee basis, if they so wish.

The proposed rates will remain in effect until March 31, 2024. The service provider is required to indicate in their proposal the increase, if any, to their proposed rates for the last year of this Standing Offer (April 1, 2024 to March 31, 2025), including the renewal option for an additional two years. A rate increase higher than the annual Consumer Price Index (CPI) will not be accepted.

Role	CRM Business Development Lead for non-granting activities – Daily Rate	CRM Business Expertise Specialist for non-granting activities – Daily Rate	Data Architect & Analyst – Daily Rate	Procurement Specialist
<b>Consultant</b>				

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.