



REQUEST FOR PROPOSAL

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

DATE: Aug. 4, 2022

The following amendment has been made to the original document along with Questions and Answers following:

Original Text:

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
Deadline for submissions	August 10
Additional information requests from short-listed Firm(s) if required	August 17
Contract negotiations	August 22
Start of contract	September 6



New Text:

Suppliers must submit their proposals no later than **August 12, 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
Deadline for submissions	August 12
Additional information requests from short-listed Firm(s) if required	August 17
Contract negotiations	August 22
Start of contract	September 6



Questions and Answers

Question 1

Page 5, paragraph 2 states “[Proposals] 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” however, under the instructions for Part B in Appendix 1, appendices 2 and 3 are listed as items k) and j) included within the maximum 5 pages of Part B.

Can the Council please clarify if appendices 2 and 3 are included in the nine (9) page maximum?

Response: the appendices 2 and 3 are included in the nine (9) pages.

Question 2

Can the Council please provide guidance on what information should be included in Part A: Summary of Proposal?

Response:

Base of the best practices, the summary could include:

- Interest in the areas of services
- Company or business profile
- Team summary
- Key competencies, internal capacity, and achievements
- List of past successful projects
- Proposed rates and services
- Other relevant information

Question 3

Can the Council please provide guidance on what information should be included in Part B: j) “Service Offerings for Considerations”?

Response: Indicate services in subject areas that are relevant to your expertise and interest, i.e., CRM Business Development Lead for non-granting activities, CRM Business Expertise Specialist for non-granting activities, Data Architect & Analyst, and Procurement Specialist



Question 4

Page 6, paragraph 6 “Evaluation of Proposals” states “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).”

Can the Council please clarify whether these points will be awarded for the references provided in Appendix 2, or in Part B, e) “List of relevant similar projects, as well as references or testimonials from past or current projects”?

Response: The points will be awarded for the references for the services provided in the public and private sector as presented in the part B.