Request for Proposals for EMCN's Database Development

Issue date October 31, 2018

Response deadline: 4:30pm on November 21, 2018

Introduction

The Edmonton Mennonite Centre for Newcomers (EMCN) is seeking proposals from qualified IT and data management firms to configure an integrated, agency-wide database to manage client information. We have recently undergone a series of scoping workshops with all of our program areas to identify their data management needs. From this scoping exercise, we have determined that a database configured with Microsoft Dynamics CRM will meet our needs. Therefore, we are seeking proposals from firms with experience configuring Microsoft Dynamics CRM.

EMCN is a registered charity that has been serving the Edmonton community for the last 35 years. As a registered charity, EMCN offers Employment and Career Services, Language Services, Settlement and Community Support Services. Our goal is to walk with newcomers to bridge their transition into local communities, which ultimately benefits both the individual and their families, and the city as a whole. EMCN anchors its practices in social justice, inclusivity and diversity, and strives to achieve these values while helping to improve the quality of life for all newcomers. We have attached the 2017 Community Report for review.

Since 1982, EMCN has strived to support and foster the lives of newcomers and immigrants in Edmonton and surrounding area. We started with 1.5 staff members and we have grown to over 230 staff serving over 15,000 clients annually. We currently offer programs in six locations across Edmonton (West End, Nova, WCI, NE Hub and 82 Street).

Evaluation and data management at EMCN

At present, EMCN does not have an agency-wide database to manage client information and track referrals. Instead, we have a disconnected series of data management tools being used in each program. Our programs use a combination of Excel spreadsheets, Access databases and New Org. which is our internal database that tracks some of our clients' information but is limited in its ability to track all client information. In addition to internal systems some of our programs also enter client information into funder databases such as iCARE and Mobius.

This disconnected system means that client information cannot be shared across programs and clients have to retell their stories and demographic information over and over when they access a new program. For some of our clients, this can bring up negative memories as they are forced to relive them each time they access a new program. It also wastes time as the clients retell their stories and counsellors have to re-enter the information into their different systems both internal and external.

EMCN collects required client demographics such as contact information, immigration status and arrival dates in order to maintain contact with the clients and to report to our funders. In addition to basic demographic information, we also collect information about client needs, goals and action plans in order to track their progress. Client outcomes are tracked to ensure we are helping them achieve their goals. The ideal solution will support our ability to:

1. Track client contact information to ensure we can maintain contact with our clients and update them about relevant events and information.
2. Schedule client appointments.
3. Track client demographics and bulk upload them to funder databases.
4. Identify and maintain client needs assessments and action plans.
5. Report on client outcomes and pull relevant client information to support our program planning.
6. Train counsellors and other staff in successfully entering clean client information.
7. Track referrals and the movement of clients within our agency.

To see detailed requirements and the completed scoping exercise report, please contact the Outcomes Measurement Specialist (contact information below).

<u>Objective</u>

The objective of this project is to configure a client information management system using Microsoft Dynamics CRM that brings together all of our programs to track all client information, measure outcomes and track client journeys.

<u>Project Organization and Management</u>

The database project will be managed by the Outcomes Measurement Specialist, Manager of Settlement Programs and our Executive Administrator. Collectively, they will be responsible for:

1. Guiding discussions around methodology, requirements and recommendations.
2. Approving project deliverables.
3. Training staff on proper use of the database.

The day-to-day liaison with the consultant will be through the Outcomes Measurement Specialist.

<u>Mandatory Qualifications/Requirements</u>

To qualify for inclusion in this project, your firm must be able to satisfactorily demonstrate that it can meet the following qualifications/requirements:

1. The lead firm must have completed at least three (3) similar sized database configuration projects in Canada within the past five (5) years, with one being a Canadian non-profit of similar size or larger than EMCN and one project must have been in use successfully for a minimum of five years.

Scope of work

The successful firm will:

- Understand the client information management needs of each program and the agency as a whole.
- Configure Microsoft Dynamics 365 to meet EMCN's client information management needs.
- Maintain full continuous contact with EMCN staff.
- Train super users at EMCN and support them in training and implementation.
- Implement and test the client information management system and make adjustments as required.

Submission Process

1. Prices shall be provided in Canadian funds, inclusive of all applicable duties and taxes except GST. Price adjustments due to currency fluctuations, or any other reason, will not be accepted.
2. Prior to the submission of bids, each vendor shall review this RFP and the additional information available from Kirsten Mah to ensure they have a full understanding of the agency's requirements and needs.
3. Your firm's tender bid will address the following points, in sequence, each section to be clearly titled and separated from the other sections.
    a. Expertise:
        i. Provide a brief description of your company's skills and expertise in implementing CRM software.
        ii. Provide details of any work where sub-consultants are used by your company (if applicable), including their name and their relevant experience to the project.
    b. Account Management:
        i. Provide a brief description of your company's location, size, products and services, number of years in business, corporate structure and length of time in the CRM/IT industry and the resources available that will be responsible for managing EMCN's account.
        ii. Provide a list of the key members of the team that would be assigned to EMCN's account, including name, location, qualifications, related experience and role.
        iii. Provide information on customer service, specifically how and when we are able to contact our account management in the event of problems or a requirement for information.
    c. Project References:
        i. Project title and description including year completed and number of years in use.
        ii. Contact information for reference.
        iii. Type of agency.

        iv. Timeframe.

d. Project Plan, Transition Methodology and Schedule:
    i. Provide a detailed project plan which will include an explanation of the methodology/approach your firm employs when transitioning a new client from their existing system to the new one.
    ii. Indicate how EMCN can implement the optional software components over time and subscribe to licensing costs as services are implemented. (e.g., additional Microsoft programs such as Power BI)
e. Training:
    i. Describe the training approach to ensure super users and general staff are able to successfully implement the new system.
    ii. Describe other methods of training available to EMCN users during and after implementation (on site, web based, etc.)
    iii. Describe all documentation and training manuals (and formats) provided.
f. Project Deliverables:
    i. Provide a comprehensive list of all deliverables that will be provided as part of this project.
    ii. List milestones of when deliverables can be expected.
g. Expectations of EMCN:
    i. Provide details of requirements from EMCN, which may include facilities, equipment and resources that need to be provided by EMCN, if any, for successful completion of the project.
h. Your firms billing process.

<u>Evaluation of submissions</u>

	Criteria	Weight
1.	Prior experience in non-profit database development as outlined above (3 non-profits of similar size using Microsoft Dynamics 365)	15%
2.	Location of company and access EMCN has to development team (restricted to Canadian companies and prioritize local)	10%
3.	Financial background and company history (how long the company has existed and its financial standing)	10%
4.	The cost of the proposed solution	20%
5.	Long term sustainability of the plan and availability of and need for on-going support (The plan must outline how sustainable the solution is and what on-going support/costs will be necessary)	10%
6.	Available training for agency super users	5%
7.	Implementation plan/tender bid’s thoroughness and feasibility	20%
8.	Security and privacy protections built into the plan	10%

Conflict of Interest

1. If the box below is left blank, the bidder will be deemed to declare that (a) there was no conflict of interest in preparing its bid; and (b) there is no foreseeable conflict of interest in performing the contractual obligations contemplated in this project.
2. Otherwise, if the statement below applies, check the box.
    - ☐ The bidder declares that there is an actual or potential conflict of interest relating to the preparation of its bid, and/or the bidder foresees an actual or potential conflict of interest in performing the contractual obligations contemplated in the project.
3. If the bidder declares an actual or potential conflict of interest by marking the box above, the bidder must set out below details of the actual or potential conflict of interest.

Contact information

If interested in submitting a proposal for this RFP, please contact Kirsten Mah, kmah@emcn.ab.ca to receive the results of the scoping exercise and further information. In order to maintain transparency and a fair process, questions submitted to EMCN will be sent anonymously along with a response to all of the bidders.

Submission of proposals

Complete proposals should be submitted to Kirsten Mah, kmah@emcn.ab.ca no later than 4:30pm on November 21, 2018.