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2010-08-12

**REQUEST FOR PROPOSAL
FUND DEVELOPMENT/MEMBERSHIP COMPUTER CONSULTING SERVICES
RFP 38 (2010-08)**

Toronto Zoo requests proposals from professional, experienced qualified, consulting firms to assess and complete a need analysis to replace the existing Customer Relations Management (CRM) information management systems for the Toronto Zoo's Development Office and Member & Guest Services Branch as detailed in this Request for Proposal (RFP).

Proposal Meeting A information meeting for proponents will be held Monday, 2010-08-23, at 1300 hours (1:00 p.m.). Meet at the Administrative Support Centre, enter at Gate A, 361A Old Finch Avenue, west of Meadowvale Road, Scarborough, Ontario.

Proposal Five (5) copies of the proposal submissions, one (1) marked original unbound signed copy and four (4) copies of the original proposal, marked as copy, must be received by Purchasing & Supply, Toronto Zoo, Administrative-Support Centre, 361A Old Finch Ave., Scarborough, ON M1B 5K7 by

Wednesday 2010-09-01, by 1200 hours (noon), Local time

Proposal prices shall remain in effect for a period of ninety (90) days from the Proposal due date

The Board of Management of the Toronto Zoo reserves the right to reject any or all Proposals or to accept any Proposal, should it deem such action to be in its interests.

For any questions relating to the contract terms and conditions of the RFP, please contact Peter Vasilopoulos, (416) 392-5916. If you have any technical queries regarding the assignment, please contact Charles Duncan, Computer Services & Telecom Manager at (416) 392-5926.

Yours truly

R.D. Hale
Chief Operating Officer

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1.0 GENERAL TERMS

1.1 DEFINITIONS

- 1.1.1 The Board of Management of the Toronto Zoo and its designated representative hereinafter called "**the Zoo**", with whom the consultant has contracted to perform the required services.
- 1.1.2 "**Consultant**" means the person, partnership or corporation contracting with the Zoo to provide the required Services.
- 1.1.3 "**Contract**" means the acceptance by the Zoo (by way of written acknowledgement, Agreement, Contract or Purchase Order) to furnish Services for money or other considerations.
- 1.1.4 "**Preferred Proponent**" means a Proponent whose Proposal, as determined by Toronto Zoo staff through the evaluation process described, provides high value in meeting the Toronto Zoo's requirements;
- 1.1.5 "**Proponent**" means the individual or corporation who has submitted the response to this RFP;
- 1.1.6 "**Proposal**" means a response submitted in response to this RFP;
- 1.1.7 "**Request for Proposal (or RFP)** means the document issued by the Toronto Zoo which seeks binding offers from Proponents;
- 1.1.8 "**Toronto Zoo**" or "**Owner**" or the "**Board**" means the Board of Management of the Toronto Zoo;
- 1.1.9 "**Work**" or "**Service**" means all work required under these documents, and in accordance with the Terms of Reference/Scope of Work and Contract Requirements.

2.0 OVERVIEW OF PROJECT AND PURPOSE OF THE RFP

2.1 Introduction

- 2.1.1 The Toronto Zoo has launched a project to replace the Zoo's core membership and Fund Development management system with a public sector version of an off-the-shelf software package. Today, there are a number of separate (computer or manual) systems that perform these functions, which include constituent relationship management (CRM), online fundraising, moves management, membership management, stewardship, planned giving, special event management, major giving, deferred giving, reporting and analysis, and processing campaign performance and benchmarking. The computer systems and software supporting these core functions are technologically out-of-date, have limitations in their capabilities, and/or are no longer supported by the vendor(s). Toronto Zoo intends to replace the current aggregation of systems with an integrated solution utilizing a robust package that will be used to perform basic management, financial and administrative functions.

- 2.1.2 This document will define the approach for procurement of services, software and hardware that will be followed, the scope of the work to be performed, the requirements the proponent must address, how to respond to this RFP, how the responses will be evaluated, and the administrative requirements that must be followed.

2.2 Project Approach

- 2.2.1 This project will have two phases. The phase 1 of this project, the Requirements Definition/Software Selection Phase, will be to define the fund development/membership solution that best meets the Zoo's needs. The selected consultant will assist the Zoo in:

- a) Defining software and hardware requirements for the system.
- b) Defining an approach for addressing business process change within the system implementation.
- c) Developing the “Requirements Specification” and assist to draft the specifications to issue a separate RFP for a Fund Development/management system.
- d) Assist in the Evaluation and selection of software based on the subsequent RFP issued by the Toronto Zoo.
- e) Develop a detailed project plan for the implementation phase of the project and a corresponding cost estimate to complete the implementation.

- 2.2.2 The second phase of the project, the System Implementation Phase will include the work activities required to complete the implementation of the new system and to bring it into stable production mode. In this RFP the Zoo will require proponents to propose a general implementation methodology or approach and to define the major tasks required to implement the fund development/membership system.

- 2.2.3 Toronto Zoo will need the assistance of a consultant in both the Requirements Definition/Software Selection Phase and the System Implementation Phase of this fund development/membership project. This RFP is issued to acquire consulting services for Phase I.

Note: Zoo will not entertain proposals in response to this RFP from proponents of fund development/membership software packages.

- 2.2.4 In this Requirements Definition/Software Selection Phase, the consultant selected will work with the Zoo to complete a single Requirements Specification for an fund development/membership system solution, including software and required hardware. The consultant will assist the Zoo in drafting the specifications to issue a separate RFP for an fund development/membership system and in selecting the preferred software package.

- 2.2.5 At the end of Phase I, the Zoo may elect to enter into negotiations with the consultant who completed Phase I, to procure implementation services. Failing this the Zoo may, at its discretion, select a different entity to be the prime consultant for the implementation (Phase II).

2.3 Project Objectives

2.3.1 The Zoo plans to address both the business and technology needs of Toronto Zoo through the implementation of a fund development/membership solution.

2.3.2 The following are the major business objectives of the fund development/membership project:

- a) Streamline the Zoo's core through business process re-engineering in conjunction with the implementation of the fund development/membership package administrative and financial processes;
- b) Eliminate administrative activities that add no value, such as redundant keying and reconciliation membership, donor, and contact data;
- c) Address the business requirements of the divisions and units;
- d) Capture and make available to Fund Development, membership, key unit managers and administrators, and campaign managers the information needed to effectively manage operations, monitor campaigns, and measure their success - information that has often been hard to access, out-of-date, inaccurate or unavailable;
- e) Provide functional managers with the necessary technology, tools, and training to enable them to extract the data they require to meet their business needs;
- f) Greatly enhance the ability to report expenditures by campaign, cost centre or project through implementation of account coding for programs and projects;
- g) Enable the Zoo to more efficiently conduct business with its vendors and service providers, staff, and clients through expansion of electronic commerce;
- h) Improve the Zoo's ability to budget and measure campaign success based on performance metrics; and
- i) Facilitate integration with the Toronto Zoo's budgeting and financial reporting system.

2.3.3 The following are the major technology objectives of this project:

- a) Replace the current Fund Development/Membership systems based largely on out-of-date technology with a proven, donor centered fund development/membership package that utilizes current, mainstream technology;
- b) Simplify and integrate the Zoo's core Fund Development system infrastructure. Reduce the number of separate information systems, and the interfaces that connect them, running on different computers, written in different programming languages, and utilizing separate databases;
- c) Use the fund development/membership system as a business backbone, or foundation upon which to automate additional business functions in the future in an integrated fashion;
- d) Limit customizations to the software to hold down implementation costs, to support standardization of business practices, and to preserve the ability to upgrade to new versions as they are released;

- e) Take advantage of the strengths of the internet to the extent appropriate based on the Zoo's technical infrastructure plan and the capabilities of the fund development/membership software package selected. For example, web online, kiosks, social networking, etc.

2.4 Project Scope

2.4.1 The precise scope of the project and the phasing of implementation have not been finalized. The functions that comprise the base scope for the integrated fund development/membership system and are viewed as the top priority for inclusion in the system are the following:

- a) Fund Raising
- b) Membership Management
- c) Reporting
- d) Integration into current ERP system
- e) eMailing interface
- f) Web based sales
- g) Project/Campaign Tracking
- h) Retail Integration
- i) Annual giving
- j) Stewardship
- k) On site donation, educational kiosks integration
- l) POS capabilities
- m) Automated Credit Card Processing

2.4.2 To further assist the respondents in sizing the scope of the project, the following statistics are presented:

- a) Toronto Zoo Operational Budget - Fiscal Year 2008: \$42 Million.
- b) Approximate number of permanent and non-permanent employees: 356 FTE.
- c) Number of existing applications performing retail (MS Dynamics RMS), ticketing (Stream In Technologies) and financial (MS Dynamics GP) functions:
3
- d) 30,000- 40,000 Number of Donors
- e) 33,000 Number of Member households

3.0 PROJECT GOVERNANCE

3.1 The project is headed by a Project Team. This team is co-chaired by the Executive Director of Development and the Manager of Membership & Guest Services. Other members of the Project Team are the Manager of Computer & Telecom Services, Manager of Retail & Rides, The Project Team will approve all major project decisions, resolve or decide issues that are raised to it, and monitor project status.

3.2 The work in this Requirements Definition/Software Selection Phase will be performed by a joint Zoo/consultant team. The consultant will be in charge of day-to-day project management and be responsible for producing the deliverables specified in their proposal. Overall project

management, including vendor management and quality assurance, will be the responsibility of project team.

- 3.3 Working with the Project Team on system requirements and business process issues will be three user groups, Development, Membership & Guest Services, and Computer & Telecom Services. It is envisioned that these groups will have subject matter experts, addressing specific business process issues. It is intended that the most knowledgeable and capable users in these arenas will have dedicated time to participate on this project.
- 3.4 The organization of the Project Team, other than what is described above, has not been finalized. The user groups' structure for the Requirements Definition/Software Selection Phase will be decided by the Project Team, with input from the selected consultant.

4.0 RFP PROJECT TIMEFRAMES

4.1 Planned Schedule of RFP Activities

4.1.1 It is the Zoo's intention to comply with the following procurement schedule:

Distribute RFP to prospective bidders and post on Toronto Zoo and City of Toronto websites	Thursday 2010-08-11
Information session	Monday 2010-08-23
Proposals Submission Deadline	Thursday 2010-08-26
Evaluation of proposals	Tuesday 2010-09-07
Interview, if required	Monday 2010-09-13
Selection of best vendor/proposal announced	Tuesday 2010-09-14
Proposed start of consulting assignment	Wednesday 2010-09-15

Note: The above dates represent a tentative schedule of events. The Zoo reserves the sole right to modify these dates.

4.2 The following is a high-level view of possible project timeframes:

- Requirements Definition/Software Selection Phase begins September 2010
- Requirements Definition/Software Selection Phase completes (to be determined with selected consultant) November 2010
- System procurement/Installation/Testing/Training December, 2010
- Go-Live March, 2011

Note: These dates represent a tentative timeframe for the entire Fund Development/Membership Project. The Zoo has not yet finalized a project timeline. The consultant is expected to propose a timeframe for the Requirements Definition/Software Selection Phase. The planned timeframe for the System Implementation Phase will ultimately be determined by the Zoo with input from the selected consultant.

5.0 PROJECT STRATEGIES

- 5.1 Toronto Zoo has identified a number of strategies that will be employed in conducting this project. Consultants responding to this RFP should keep these strategies in mind, and consider their interrelationships, when developing their response to the Project Specifications section. The strategies that have been identified to date are listed below.
- 5.2 Due to the age of the current systems and lack of functionality, Toronto Zoo believes it is in its best interest to select and deploy an fund development/membership system as soon as possible.
- 5.3 Development and Membership process improvement is a major objective of this project. A three-step approach is envisioned for addressing process improvement:
 - 5.3.1 First, define Zoo's business requirements;
 - 5.3.2 Second, select the package that goes the farthest in meeting them; and
 - 5.3.3 Third, improve business processes following the best practices supported by the software selected.
- 5.4 An extension of Business Process Improvement strategy is that when confronted with the need to either change existing business processes or modify the software, it is the Zoo's intent to change business processes (exceptions might be requirements impacted by legislation, business contracts, or true productivity issues).
- 5.5 Toronto Zoo plans to engage consultants to define the Requirements Definition/Software Selection Phase and the System Implementation Phase to take advantage of the experience and expertise of qualified consultant(s) to help ensure the success of the Zoo's fund development/membership project.
- 5.6 A joint Zoo/Consultant team will complete the work of the Requirements Definition/Software Selection and implementation phases of the project with the mutual goal of a successful system implementation. The Zoo's goal is to build the capability of its employees to maintain the system after it has been implemented and its stability has been assured.
- 5.7 Toronto Zoo recognizes that the handling of business process change and change management are critical success factors for the Fund Development/Membership Project. The Zoo intends to work with the consultant selected to define an approach that addresses Toronto Zoo's requirements.
- 5.8 The requirements definition and selection process must have significant input and participation from the two business units, which will be using the system to perform their daily functions.
- 5.9 Consultant will be expected to act as a expert resource and to attend meetings with Toronto Zoo staff.

6.0 PROJECT SPECIFICATIONS

- 6.1 This section describes the scope of the work that is expected to be performed during Phase I, by the consultant selected to assist the Zoo with its fund development/membership project.
- 6.2 The following deliverables will mark the successful completion of Phase I:

- 6.2.1 Software Requirement Analysis for each business unit (Membership/Development);
 - 6.2.2 Current and future business process diagrams;
 - 6.2.3 Complete the Requirements Specification to issue a separate RFP for Fund Development/Membership system;
 - 6.2.4 GAP analysis between the Zoo requirements and Fund Development/Membership proponents;
 - 6.2.5 Fund Development/Membership Implementation Plan; and
 - 6.2.6 Cost/Benefit Analysis of the whole project.
- 6.3 Approach to Conducting the Requirements Definition/Software Selection Phase.
- 6.3.1 For Phase I of the Fund Development/Membership project, the consultant shall propose a process to be employed by the Project Team to define the Zoo's business requirements and to select a proven Fund Development/Membership solution that best meets those requirements. The consultant will also assist the Zoo in defining the steps necessary to prepare for an Fund Development/Membership implementation.
 - 6.3.2 As indicated in the project strategies, the Zoo would favour an approach that expedites the process of requirements definition, issuance of the Fund Development/Membership RFP, and software selection. While the approach proposed by the consultant should expedite the process to the extent possible (and prudent), it still must provide a sound basis for evaluating and selecting a Fund Development/membership System that will meet the Zoo's needs.
- 6.4 Business/System Requirements
- 6.4.1 The first major activity of the Requirements Definition/Software Selection phase will be to identify and document the Zoo's requirements for a Fund Development/Membership package. For the purpose of sizing the level of effort required to complete the Requirements Definition/Software Selection Phase, the consultant shall assume that requirements will be defined and documented for all of the functions listed above in the Project Scope section, except budget development. The modules of the Fund Development/Membership system to ultimately be included in the initial implementation will be decided by the Zoo, with advice from the consultant.
 - 6.4.2 The requirements should be gathered and documented in such a way as to facilitate the development of a Requirements Specification and draft RFP for a Fund Development/Membership software solution for the Zoo.
 - 6.4.3 It is envisioned that a joint Zoo and consultant team will perform the requirement gathering and definition process. In each interview or focus group conducted, both a Zoo team member and a consultant team member will be present. The consultant shall be responsible for documenting the information gathered and for insuring consistency of breadth and depth of information collected.

- 6.4.4 The Zoo team members will provide the knowledge and insight of Zoo business practices and systems to ensure that the right questions get asked and issues get explored.
- 6.4.5 One key issue that will need to be continually reviewed is the need to identify business units' requirements that are truly unique and critical, and to distinguish them from historical practices for performing a specific function that, in fact, can be adapted to fit a standard zoo-wide process.
- 6.4.6 A major component of the requirement definition activity will be to address business process change and change management. Part of the information gathering effort in this phase will be to document current business processes that are broken and to understand what the disconnects are. The consultant shall provide an approach for addressing business process improvement in conjunction with the implementation of an Fund Development/Membership system. The consultant shall propose steps the Zoo should take to prepare for business process change. Other considerations to be analyzed are the role that limiting customizations to the Fund Development/Membership software plays in changing business processes and what business process changes should be postponed until after the Fund Development/Membership system is operational.
- 6.4.7 The consultant shall address change management and identify any task that should be completed in this phase to prepare for the change management effort to be conducted during implementation. The proposed tasks should be consistent with the proposed strategy for business process change.

6.5 Technical Requirements

- 6.5.1 Under the supervision of the Project Team, the consultant will review and assess the Zoo's technical infrastructure and readiness to implement a Fund Development/Membership package, which will be used by many if not all of the business units. The consultant will provide analysis of the technical strengths and weaknesses of the leading Fund Development/Membership software packages. Based on the assessments of the Zoo's architecture, technology directions, and Fund Development/membership package requirements, the consultant will recommend a technical architecture for the Fund Development/membership system and define requirements that must be met to build that architecture.

6.6 RFP Preparation and Software Selection

- 6.6.1 Under the supervision of the project team, the consultant will draft an RFP for acquiring an integrated, off-the-shelf, Fund Development/Membership software package that best meets the Zoo's functional and technical requirements. The consultant will assist the Zoo in defining selection criteria, developing a scheme for weighting or otherwise prioritizing the criteria, and proposing a plan for proponent system demonstrations based on requirements or scripts defined by the joint project team. The Zoo will issue the final RFP. Copies of the proposals will be given to the consultant to evaluate.

6.6.2 As an input to the selection process, the consultant will provide the Zoo with an objective analysis of the strengths and weaknesses of the major Fund Development/Membership software proposals that have responded to the Zoo's RFP. This analysis should cover features and functions performed by the software, technical requirements, and any implementation considerations or issues.

6.6.3 Upon evaluating the proposals and the software demonstrations based on the selection criteria, the consultant will recommend, and the Zoo will select, the Fund Development/membership solution that is the best fit to be implemented.

6.7 Project Management

6.7.1 While Phase I of the project will be conducted jointly by the Zoo and the consultant, the Zoo is looking to the consultant to play a lead role in managing the day-to-day activities of the project. Toronto Zoo will maintain overall responsibility for the management of the project through the Project Team.

6.7.2 Project management activities expected of the consultant include (but are not limited to) providing overall project guidance and direction; producing regular project status reports; providing recommendations to the project team on how to address issues that arise; maintaining an issue log tracking the issues raised and their resolution; ensuring consistency and quality of project deliverables; monitoring actual progress against the project plan; providing project briefings as necessary; and developing and maintaining a detailed project plan.

6.7.3 To initiate this phase of the project the consultant and the Zoo will need to confirm and finalize the strategies/approaches to be employed, the organization of the joint Project Team, and the detailed plan for the Phase I. The consultant should address project initiation in the proposal and identify the tasks that should be performed.

6.8 Project Implementation Planning

6.8.1 The consultant will work with the Project Team to produce a project plan and timeline for the implementation phase. Some of the key issues to be addressed are the implementation approach, how to phase the implementation, the target implementation dates for each phase, and the scope of each phase.

6.8.2 Additionally, the consultant will assist the Project Team in putting together a budget estimate for the implementation phase, including software, hardware, and implementation services. The consultant will also provide recommendations on the size and skills of the support team that the Zoo will require to support the Fund Development/membership system after it goes into production.

7.0 PROPOSAL REQUIREMENTS AND PROCESS

7.1 Proposal Format

For consistency and to facilitate evaluation of all responses, proponents must organize their proposals as defined below.

7.1.1 Transmittal Letter

- a) The letter should contain a brief statement of the proponent's understanding of the work to be done. The letter should identify any requirements that the proponent has not addressed in the proposal and the justification.
- b) The letter should indicate the name, title, address, e-mail address, fax number, and telephone number of the consultant's primary contact for the project and be signed by an individual authorized to commit the company to a project of this scope.

7.1.2 Table of Contents

Provide a table of contents listing each section of the proposal, including the attachments specified in this RFP and any additional materials submitted.

7.1.3 Executive Summary

The executive summary should provide a concise summarization of the services being offered to meet the Zoo's needs, proponent's approach to providing the services, and why it is the approach the Zoo should decide to follow. Similarly, the proponent should summarize their qualifications to assist the Zoo in the selection and implementation of the Fund Development/membership software, and why the proponent is best qualified to perform this engagement.

7.1.4 In the Proposal the proponent should include or respond to the following:

- a) Specify an overall approach or methodology for the Requirements Definition/Software Selection process including, software/hardware requirement definition, business process change analysis, RFP creation and software evaluation;
- b) Describe approaches to conducting a software selection used successfully by your company in other engagements;
- c) Identify major risks that will be faced in implementing an Fund Development/membership system and how they should be mitigated.

7.2 Business/System Requirements

7.2.1 Approach to Performing the Requirements Definition/Software Selection Phase.

- a) The proponent should present how they would perform the work defined in. For each section, provide an overview of how the services would be performed and the advantages of the recommended approach. Then, the proponent should respond to the specific points listed in each section.
- b) The proponent should provide a detailed project plan for the Requirements Definition/Software Selection Phase of the project that specifies the tasks that will be performed to complete the scope of work. The plan should identify phase start and end dates, and timeframes for each task. Identify any assumptions made in determining project or task timeframes.

7.2.2 In the proposal, the consultant should include or respond to the following:

- a) Define the process or approach recommended to capture the Zoo's requirements for the Fund Development/membership software, including any tools or software that will be employed;
- b) Describe approaches to requirement definition used successfully in other engagements your company has conducted;
- c) Explain how you will conduct a requirement definition process that will enable the Zoo to identify its critical and unique business requirements, ones which will be particularly important in the evaluation of how well the Fund Development/membership packages meet Toronto Zoo's needs;
- d) Provide an example of a functional requirements definition document (or an excerpt from one) that you believe is appropriate, and at the right level of detail, for inclusion in the RFP for a Fund Development/Membership package;
- e) Recommend the best approach for addressing business process change in conjunction with the Fund Development/membership system implementation;
- f) Define the planning for change management that should be performed in this phase; and
- g) Identify the deliverables that will be completed by the consultant as part of the requirements definition.

7.3 Technical Requirements

7.3.1 In the Proposal, the consultant should include or respond to the following:

- a) Define how the technical requirements for a Fund Development/Membership solution, including hardware, telecommunications, and supporting software, will be determined;
- b) Describe how you have defined technical requirements in other similar engagements;
- c) Define what technical specifications can and should be developed in this phase. What level of specification should be done prior to software selection and what has to wait until software is selected; and
- d) Identify the deliverables that will be completed as part of the technical requirement definition.

7.4 RFP Preparation and Software Selection

7.4.1 In the proposal the consultant should include or respond to the following:

- a) Define a software selection approach or strategy, including the tasks to be performed to complete the RFP preparation and software evaluation as described above;

- b) Describe what approaches or activities have proven effective in the other engagements where you have developed RFPs and evaluated software;
- c) Identify the factors critical to determining which solution is the best fit for Toronto Zoo;
- d) Describe the assistance you will provide the Zoo in analyzing how well each of the software packages meets the Zoo's needs; and
- e) Identify the deliverables that will be completed as part of the RFP preparation and software evaluations activities.

7.5 Project Management

7.5.1 In the Proposal the consultant should include or respond to the following:

- a) Define the tasks to be performed as a part of initiating the project and as part of ongoing management of the project;
- b) Describe project management techniques that have proven to be effective in projects your company has managed that are similar to this one;
- c) Provide a recommended organization chart for the project; and
- d) Provide a project plan identifying the tasks and timeframes for completing the Requirements Definition/Software Selection phase of the Fund Development/membership project.

7.6 Proposed Project Team

- 7.6.1 Identify the project team your company will assign to the Requirements Definition/Software Selection Phase of this project, if awarded the contract. Define specific roles and responsibilities for each person assigned to the project, and indicate the applicable labour category for each (the categories are listed in the cost proposal section). Specify the level of involvement planned for advisors and other personnel who will not be assigned to the project full time.
- 7.6.2 Provide resumes for the proposed project manager and senior analysts, and other staff to be assigned full time to the Requirements Definition/Software Selection Phase of the project, as well as for others who will play substantive advisory or consulting roles in this phase. The resumes should clearly identify the qualifications, capabilities, and experience relevant to this project.
- 7.6.3 Address your capabilities to fully staff the System Implementation Phase of the project. Provide resumes of likely participants, including project managers and staff with implementation experience with the major Fund Development/membership packages.
- 7.6.4 Provide a description of your company including the scope of the business, organizational structure, office locations, personnel, company history, and financial information to establish your company's financial viability.

- 7.6.5 List no more than three engagements where your company has assisted a public sector client in defining requirements, developing a draft RFP, and selecting Fund Development/Membership software for an enterprise-wide implementation. Describe the project, start and end dates, the functions/modules included, your role, the outcome, and how the engagement qualifies your company to perform Toronto Zoo's project.
- 7.6.6 List no more than three engagements where your company has been the primary implementation services provider for an implementation of a Fund Development/Membership software package. Describe the project, start and end dates, the functions/modules implemented, your role, and the outcome. Address how the experience gained from this engagement can be applied to the Requirements Definition/Software Selection phase of Toronto Zoo's Fund Development/membership project and how it qualifies you to be the prime contractor for the Zoo's Fund Development/membership implementation.
- 7.6.7 Provide the names of three references from projects listed. Provide the person's title, address, phone number, e-mail address, and role performed on the project.
- 7.6.8 Provide a list of clients, both public and private sector, for whom you have been the primary implementation services provider on a Fund Development/Membership project, grouped by the software package implemented. For each, identify the functions/modules implemented and the date of implementation. Include projects that are underway but not yet complete. Contact names need not be provided.
- 7.6.9 Disclose any legal or organizational relationships your company has with vendors of Fund Development/membership software. Describe the nature of the relationship. Also, identify any business partner or alliance relationships you have with vendors of Fund Development/membership software. Describe the nature of the partnership or alliance.
- 7.6.10 Disclose any agreements or relationships with software or hardware vendors that may present a conflict of interest to your company and potentially affect your ability to objectively advise the Zoo on hardware or software selection.

7.7 Cost Proposal

- 7.7.1 The cost proposal is for the work to be performed in the Requirements Definition/Software Selection Phase of this project, as specified below, and should be bid on a fixed fee basis. The proponent must provide a total dollar cost bid including hourly rates for the staff being proposed to perform the services identified in this RFP. The rates shall cover any expenses, such as travel, lodging and meals, which may be incurred by the project team for the duration of the project.
- 7.7.2 The prices quoted shall be good for 90 days after the proposal has been submitted and for one year after the contract is signed.

- 7.7.3 The cost breakout should include a schedule of professional fees, which should include expenses, that makes up the total dollar cost bid. Use the cost proposal format shown on the next page and provide a separate breakout for costs for the following work activities:
- a) Business/System Requirements (Section 6.4)
 - b) Technical Requirements (Section 6.5)
 - c) RFP Preparation and participation in the evaluation Software Selection (Section 6.6)
 - d) Project Implementation Planning (Section 6.8)
- 7.7.4 Include the hours/rates/cost of project management in each of the four activities or sub-phases defined above. Use one page for each of the four sub-phases and show the total project cost bid on the last page. In completing the cost proposal, other labour categories may be added if none of the listed ones is applicable.
- 7.7.5 Include the hourly rate(s) to be used during the implementation phase of the Fund Development/membership, for budgeting purposes. Actual rates may vary slightly and will be negotiated later.

Toronto Zoo - Development/Membership Requirements Definition/Software Selection Phase

Cost Proposal Form

Company Name: Date:

Work Activity:

Labour Category Hours Rate Amount

Project Manager

Analyst

Clerical

Other (specify)

Total

Project Total

8.0 SUBMITTAL PROCEDURE

- 8.1 Proponents shall submit proposals in sealed envelopes clearly identifying the RFP number in accordance with the requirements outlined in this document. Three (3) copies of the proposal, including one (1) original master copy, signed in ink, are to be submitted. One electronic copy in Word 97 on a 3½ inch diskette or CD shall also be submitted.

9.0 INFORMATION MEETING

9.1 Proposal Meeting

- 9.1.1 A information meeting will be held on Monday 2010-08-23, at 1300 hours (1:00 p.m.) at 361A Old Finch Avenue, Scarborough, ON in the Administrative Support Centre. Proponents are encouraged to submit their questions in advance via e-mail erpproject@torontozoo.ca .
- 9.1.2 Answers to all questions, whether submitted in advance or raised at the conference, will be provided via e-mail to all proponents represented at the conference. No questions will be answered prior to the site meeting.
- 9.1.3 The Zoo will attempt to reply to any written questions, which it receives no later than seven (5) business days before the due date for proposals to be submitted. Questions raised after the information session can be submitted as defined in paragraph 9.1.1, above. The Zoo does not guarantee a response to questions received less than five days before the due date. Responses will be provided by e-mail to all proponents who were represented at the site meeting.

10.0 OPENING & EVALUATION OF RFP'S RECEIVED

10.1 Initial Review of RFP Responses

- 10.1.1 The Zoo will open only those proposals received by the due date and time specified within this RFP. Immediately upon opening, the Zoo will review each proposal for compliance with the instructions and conditions applicable to this RFP. The Zoo, at its option, may seek proponent retraction and clarification of any discrepancy/contradiction found during its review of proposals. The Zoo will evaluate only proposals complying with the administrative requirements of this RFP.

10.2 Proposals Evaluation

- 10.2.1 The Zoo will evaluate the proposals (including information, which is appended, attached, and/or enclosed) against all RFP requirements, using a methodology and criteria developed specifically for this consultant selection.

Criteria	Points to be awarded
Inclusion of all proposal requirements within proposal	
Project work plan for the Requirements Definition/Software Selection phase.	30

Qualifications of key staff	25
Consultant Experience with public sector, Fund Development/membership requirement definition and software selection projects	25
Proposal pricing.	20
References	
Total score excluding interview	100
Interview (if required) Proponent who has received a high ranking may be invited to an interview with the Selection Committee, the results of which will be used by the Committee as a mechanism to revisit, revise, confirm and finalize the score and select the Preferred Proponent.	
Proponent's presentation and ability to answer questions during Interview	50
Total score including interview	150

10.3 Oral Presentations

10.3.1 Oral presentations by selected proponents may be required at a place and time designated by the Zoo, as part of the evaluation process.

10.4 Notification of Awards

10.4.1 The Zoo will notify the successful proponent by telephone or email..

11.0 PROPOSAL EVALUATION AND PROPONENT SELECTION

11.1 Evaluation Factors

11.1.1 The following factors will be used by the evaluation team to evaluate the proposals and to determine the best proponent:

- a) The response to Project Specifications section pertaining to the Requirements Definition/Software Selection Phase.
- b) The project work plan for the Requirements Definition/Software Selection phase.
- c) The proposed project team's qualifications for conducting an Fund Development/membership requirement definition and software selection for a large, public sector client.
- d) Company experience with public sector, Fund Development/membership requirement definition and software selection projects.
- e) Company experience with Fund Development/membership implementations in the public sector.
- f) Cost proposal for the Requirements Definition/Software Selection Phase.

Note: The order in which the above factors are presented is no indication of the relative weight the factors have been assigned in the evaluation methodology.

12.0 TORONTO ZOO RIGHTS AND OPTIONS RESERVED

12.1 Toronto Zoo reserves the right to award the contract to any proponent who will best serve the interest of the Zoo. Toronto Zoo reserves the right, in its sole discretion, to exercise the following rights and options with respect to the proposal submission, evaluation and selection process under this RFP:

- To reject any or all proposals;
- To re-issue this RFP at any time prior to execution of a Statement of Work (SOW);
- To cancel this RFP with or without issuing another RFP;
- To supplement, amend, substitute or otherwise modify this RFP at any time prior to selection of one or more proponents for negotiation;
- To accept or reject any or all of the items in any proposal and award the work in whole or in part;
- To waive any informality, defect, non-responsiveness and/or deviation from this RFP and its requirements;
- To permit or reject at the Zoo's sole discretion, amendments (including information inadvertently omitted), modifications, alterations and/or corrections of proposals by some or all of the proponents following proposal submission;
- To request that some or all of the proponents modify proposals based upon the Zoo's review and evaluation;
- To request additional or clarifying information or more detailed information from any proponent at any time, before or after proposal submission, including information inadvertently omitted by the proponent.

12.2 Proposal Preparation Costs

12.2.1 The proponent shall bear all costs and expenses with respect to the preparation and submission of its proposal and the proponent participation in the proposal process (the "Proposal Preparation Costs"), including, but not limited to: site visits and inspections, all information gathering processes, interviews, preparing responses to questions or requests for clarification from the Board, preparation of questions for the Board, and contract discussions and negotiations.

12.2.2 The Zoo shall not be responsible for or liable to pay any proposal costs of any proponent regardless of the conduct or outcome of the Proposal Request, Purchase Order process or Contract process.

13.0 INSURANCE, INDEMNIFICATION, OCCUPATIONAL HEALTH AND SAFETY ACT REQUIREMENTS AND TORONTO ZOO POLICIES

13.1 Professional liability insurance in the amount of \$250,000 (per claim) and \$1,000,000 general liability insurance in respect of injury or death to a single person or for property damage in a manner satisfactory to the City of Toronto Treasury Department must be maintained through the project and is inclusive of the fee proposal.

13.2 The Consultant hereby agrees that the Consultant will keep harmless and fully indemnify the Board, the City of Toronto, the Toronto and Region Conservation Authority, their employees,

officers and agents against all actions and claims against all loss, liability, judgements, costs, demands or expenses which they or any of them may sustain as a result of the negligent or intentional acts or omissions of the Consultant, its agents, servants, employees or subconsultants or any of them, in the performance of the Services, save and except and only to the extent that any such loss, liability, judgements, costs, demands or expenses are caused by the Board or those for whom at law it is responsible.

14.0 PROPOSAL FORM

I hereby submit the Proposal and will comply with all terms, conditions, specifications and drawings (when provided) as set out herein.

COMPANY INFORMATION	
Company Name:	
Contact Name:	Title:
Signature:	Date:
Address:	
Telephone #:	Fax #:
Email:	Web Site:
GST #:	

This form must be completed, properly signed and received on or before the date and time specified or your Proposal will not be considered.

Proposal prices shall remain in effect for a period of ninety (90) days from the Proposal due date.

The Board of Management of the Toronto Zoo reserves the right to reject any or all Proposals or to accept any Proposal, should it deem such action to be in its interests.

DISCOUNT	Discount	Days
Discount allowed for prompt payment and period within which invoice must be paid to qualify.	%	

NOTICE OF NO BID

INSTRUCTIONS:

It is important to the Toronto Zoo to receive a reply from all invited bidders. If you are unable, or do not wish to submit a bid, please complete the following portions of this form. State your reason for not bidding by checking the applicable box(es) or by explaining briefly in the space provided. It is not necessary to return any other Request for Proposal/Quotation/Tender documents or forms. Please just return this completed form by fax or by mail prior to the official closing date. Purchasing and Supply Fax Number: (416) 392-6711.

A Proposal/Quotation/Tender is not submitted for the following reason(s):	
<input type="checkbox"/> Project/quantity too large.	<input type="checkbox"/> Project/quantity too small.
<input type="checkbox"/> We do not offer services or commodities to these requirements	<input type="checkbox"/> Cannot meet delivery or completion requirement
<input type="checkbox"/> We do not offer this service or commodity.	<input type="checkbox"/> Agreements with other company do not permit us to sell directly.
<input type="checkbox"/> Cannot handle due to present commitments.	<input type="checkbox"/> Licensing restrictions
<input type="checkbox"/> Unable to bid competitively.	<input type="checkbox"/> We do not wish to bid on this service or commodity in the future.
<input type="checkbox"/> Insufficient information to prepare quote/proposal/tender	<input type="checkbox"/> Specifications are not sufficiently defined
<input type="checkbox"/> We are unable to meet bonding or insurance requirements.	

<u>Other reasons or additional comments (please explain):</u>

Company Name:	
Address	
Contact Person:	
Signature of Company Representative:	
Date:	
Phone Number:	
Email address	
Fax Number:	

SUBMISSION LABEL

This address label should be affixed to the front of your sealed tender, quotation and proposal envelope/package submission. Toronto Zoo will not be held responsible for envelopes and packages that are not properly labelled or submitted to an address other than the one listed on this label.

Vendor Name

**RFP 38 (2010-05) FUND DEVELOPMENT/MEMBERSHIP COMPUTER CONSULTING
SERVICES**

Closing: Wednesday, 2010-09-01, 12:00 hours (noon local time)

**TO BE RETURNED TO
Toronto Zoo
Supervisor, Purchasing & Supply
ADMINISTRATIVE SUPPORT CENTRE
361A OLD FINCH AVE.
SCARBOROUGH, ONTARIO
M1B 5K7**