



REQUEST FOR PROPOSALS – PROJECT MANAGEMENT:

NATIONAL WEBGRANTS SYSTEM (USER ACCEPTANCE TESTING; QUALITY ASSURANCE; TRAINING; IMPLEMENTATION) Deadline for Response: Friday February 2, 2007

DATE: January 16, 2007

INTRODUCTION:

The Canadian Breast Cancer Foundation seeks project management expertise to guide user acceptance testing, quality assurance, training and implementation of a customized national grant-making database in support of the Foundation's charitable investment activities. The project manager (or project management team) will have expertise in optimizing stakeholder input, coordinating and addressing multiple program and stakeholder needs, identifying best practices, managing change, and ensuring that specified software requirements are fully tested and implemented for CBCF's five business units located across Canada. Successful applicants will have demonstrated experience in the successful testing and implementation of multi-faceted software systems in a regional or national context. Familiarity with grant allocations, peer review and grant monitoring processes is highly desirable and relevant to this project.

BACKGROUND – Canadian Breast Cancer Foundation:

Established in 1986, the Canadian Breast Cancer Foundation (CBCF) is the leading national volunteer-based organization in Canada dedicated to creating a future without breast cancer. CBCF works collaboratively to fund, support and advocate for relevant and innovative breast cancer research; meaningful education and awareness programs; early diagnosis and effective treatment; and a positive quality of life for those living with breast cancer.

CBCF is organized into five equal business units, consisting of the National Office, BC/Yukon Office, Prairies/NWT Office, Ontario Office and Atlantic Canada office. CBCF fulfills its mission through grant allocations and cause-related programs delivered by each regional office that address the unique needs and priorities of the breast cancer community in that region.

BACKGROUND – Project Scope:

With its organizational objectives and user needs in mind, CBCF defined and prioritized its grant management system requirements to support cause-related grants and programs across its five business units, and then selected a software system that could meet its requirements with some customization. A detailed and comprehensive set of software criteria and functionality was established, that the software system is designed to meet.

The software vendor has completed design and delivery of the customized software application to CBCF for user acceptance testing and implementation. CBCF requires project management and coordination for software testing, training and implementation across all business units.

PROJECT OBJECTIVES:

To ensure that:

- The grant allocations software meets all specified criteria and requirements;
- Each grant allocations software system module is fully tested for functionality within the context and data requirements of each business unit;
- Newly identified criteria or functionality requirements be assessed and prioritized;
- Relevant stakeholders are consulted and their input is received and considered;
- Best practices and data standards are established, while maintaining sufficient flexibility to address unique requirements of the five business units;
- Approved data structure, coding schemes and report templates are implemented within the software system;
- Data input and implementation plan is created and operationalized for all business units;
- Software implementation plan includes change management strategies;
- User support and trouble-shooting assistance is provided to all business units for initial implementation;
- All activities and outcomes are scheduled and coordinated across all business units

PROJECT ACTIVITIES:

- Confirmation of software functionality as specified by CBCF
- Collaboration with "Project Consultant – Data Structure and Coding" on implementation of approved grant program and project definitions for standardized coding and reporting purposes
- Collaboration with "Project Consultant – Data Structure and Coding" on development of grant management software system reporting capabilities to meet CBCF requirements
- Collaboration with "National IT Project Manager - CBCF" on technical issues, installation and IT support
- Collaboration with business unit stakeholders on project inputs and outcomes
- Development and implementation of standardized systems and procedures for: user acceptance testing, identification and resolution of deficiencies, re-tests with internal and external stakeholders/system users prior to implementation
- Determination of data input support required for all business units and implementation of data input procedures
- Development and implementation of CBCF-specific business rules, system standards, user standards and user manual
- Documentation of issues to be addressed in subsequent system upgrades (i.e. enhancements that were out of scope for Phase I build)
- Trouble-shooting and user support for initial implementation in each business unit when system goes "live"

PROJECT DELIVERABLES:

- Implementation of fully tested Grant Management Software Solution that meets CBCF criteria and functionality, incorporates best practices and meets unique program needs of the five business units
- Schedule of grant program and project definitions for standardized coding and reporting purposes
- Schedule of standard data sets, code table structures and business rules to be utilized within the grant management software system
- User Guidebook and standards for data coding and reporting functions
- Agreement between all business units on whether all cause-related investments will be recorded within the grant management software system – if agreed: specification of system enhancements required to support this functionality
- Documentation of issues and system upgrades to be addressed in this phase, or future upgrades
- Data input and implementation plan operationalized for all business units
- System Technical requirements addressed and system operating smoothly
- User support and trouble-shooting assistance completed for initial implementation

PROJECT PARTICIPANTS:

Designated Allocations, Health Promotion, Finance, Marketing/Communications, Development and Executive Team staff from all business units. Project Consultant – Data Structure and Coding; Facilitator – Allocations Onsite Meeting; National IT Project Manager

REPORTING STRUCTURE:

Project Manager/Project Management Team report to Associate Director of Allocations and Evaluation, Ontario Business Unit

PROJECT DURATION:

Estimated 10– 12 months; schedule and effort by week/month dependent upon development of detailed work plan and by Project Manager in Phase "A".

SPECIFIC ACCOUNTABILITIES:

- Development, scheduling, and implementation of standardized testing and feedback mechanisms for CBCF business unit internal and external system stakeholders, to ensure that the WebGrants system is fully tested and proven to meet CBCF specifications prior to implementation
- Guidance/Assistance to system users with creation of test data to address all system functionality
- Prioritization and coordination of system updates with the software vendor to address CBCF specifications and re-testing for user acceptance as required
- Identification and prioritization of system enhancements requested by stakeholders, for consideration by CBCF
- Ensuring that data schemes and structures will support system reporting requirements; consult with software vendor on the development of custom system reports as required
- Ensuring that balance is achieved between supporting the variety and flexibility of funding mechanisms and programs in place in each of the business units, and ability to report on a consolidated basis
- Advising/Training end users in each business unit on the effective use of the software and coding schemes
- Trouble-shooting operational or technical issues with National Office IT staff during initial implementation and ensure that issues are addressed
- Quality Assurance – ensure that all processes, issues and standards are documented and addressed

KEY TASKS:

- Develop specific business plans, schedules and work breakdown structure within the context of the existing project charter
- Organize the project team into appropriate work groups and work closely with project leads to support and guide the entire project team in their effort to achieve their goals and produce deliverables within the specified time frames
- Monitor performance against expectations for the project team
- Establish and implement an overall project communication plan including a progress reporting mechanism to keep stakeholders informed
- Monitor project scope management process. Ensures that change requests with a significant impact on the project are brought forward for resolution
- Analyze resource needs and recommend appropriate resources
- Track milestones and inform team leaders of any issues that may compromise the project

REQUIRED QUALIFICATIONS:

The Project Manager (or project management team) will be highly motivated, adaptable, and collaborative with strong project management skills, interpersonal skills, and knowledge and experience in implementing a multi-faceted database system in a regional or national context. Familiarity with grant allocations, peer review and grant monitoring processes is highly desirable and relevant to this project.

The ideal candidate(s) will possess the following:

- Minimum five (5) years experience in progressively senior project management roles including supervisory experience
- Proven collaboration/consultation skills
- Proven organizational and project management skills
- Proven change management skills
- Mature judgment and problem-solving abilities
- Ability to oversee several project components simultaneously and thrive in a dynamic environment
- Advanced computer skills (Microsoft Office, Microsoft Project)
- Strong writing, communication and interpersonal skills
- Skill in negotiation and developing consensus, both internally and externally, with people who reflect the full range of diversity in objectives
- Knowledge and ability to lead; think creatively; pro-actively adapt to changing environment; act decisively, and motivate, develop, inspire, and empower others.
- PMI Certification will be an advantage
- Demonstrated interest in or experience with the non-profit sector

REQUIRED ABILITIES:

- collaborative working style, with demonstrated success in a team-based environment
- excellent conceptual, analytical and research skills
- excellent oral and written communication skills in English, including presentation skills
- ability to understand the breast cancer environment and CBCF's role within the field
- excellent interpersonal skills
- sound judgment and ability to work with diverse stakeholders
- ability to build and sustain positive and mutually supportive relationships with internal and external stakeholders
- ability to identify and implement solutions and constructively problem-solve
- excellent project planning and organizational skills and ability to multi-task and meet deadlines
- strong computer skills

DESIRABLE QUALIFICATIONS AND ABILITIES:

- knowledge of French
- knowledge of allocations, peer review and grant monitoring processes

KEY PROJECT PHASES:

- A. Consultation with task group and business unit stakeholders. Development of detailed work breakdown structure, schedule and implementation budget for approval.
- B. Implementation of project and deliverables based upon approved plan and budget developed in Phase "A".

DELIVERABLES and PAYMENTS:

25% payment upon delivery and approval of detailed implementation plan at conclusion of Phase "A" (detailed work plan, work breakdown structure, schedule, milestones, budget for Phase "B", based upon consultations with all business units/stakeholders).

25% upon completion of agreed Phase "B" milestone #1 – to be identified in Phase "A" plan

25% upon completion of agreed Phase "B" milestone #2 – to be identified in Phase "A" plan

25% upon completion of agreed Phase "B" milestone #3 – to be identified in Phase "A" plan

Project Budget:

For Phase "A" – To be submitted with response to RFP.

For Phase "B" – To be submitted with detailed implementation plan arising from Phase A consultations/planning.

SUMMARY OF COMPULSORY REQUIREMENTS FOR RESPONSE TO THE RFP

The response to the RFP must demonstrate or include sufficient information about each of the following components in writing, for each to be fully assessed. Only those proposals that include all of these components and are submitted before the deadline will be considered during the selection process:

- A) **DETAILED WORK PLAN AND BUDGET FOR PHASE "A"**
 - o Describe approach to be taken, tasks, timelines and budget to complete Phase "A" – consultation/planning with CBCF stakeholders
 - o Describes the Project Manager's approach to the project, approach to working with the CBCF project stakeholders, and approach to ensure that requirements and deliverables of the implementation plan (Phase "B") will be met.
 - o State assumptions upon which the detailed work plan and budget for Phase "A" are based.
- B) **DESCRIPTION OF APPROACH TO BE TAKEN IN REGARD TO PHASE "B" – Implementation**
 - o Describes the general approach to be taken in regard to implementation. Respondents should draw on previous experience and learnings as well as the stated requirements for Phase "B" in outlining the anticipated steps to be taken. The submission should include an implementation outline, including the anticipated phases and milestones to be addressed in Phase "B" (to be further clarified/confirmed through Phase "A" consultation).
 - o State assumptions upon which the implementation plan outline is based.
- C) **STATEMENT OF EXPERIENCE AND CONTRIBUTIONS TO THE FIELD:**
 - o A detailed statement of experience is required for each of the proposed personnel named in the proposal submission. The statement will describe the Project Manager (Project Management Team's) capacity to carry out the proposed work including their fundamental understanding of project management and database implementation. It will demonstrate the personnel's analytic, conceptual and writing abilities, and, also consider the personnel's knowledge, experience and productivity in projects of this nature.

- D) **CURRICULUM VITAE**: A supporting curriculum vitae for each of the proposed personnel is required.
- E) **BUDGET & BUDGET JUSTIFICATION**: Provide an estimate of Project Management costs and timelines to undertake Phase "A" of the project (ie. consultation with stakeholders and development of detailed implementation plan). The budget should provide justification for the amounts proposed including a cost breakdown for all components of the work including professional fees and other incidentals. Provide outline of how budget for Phase "B" will be determined and what underlying assumptions and/or component costs will be included.
- F) **REFERENCES**: Complete contact information for a minimum of 3 references who are able to comment on the relevant experiences of the candidate(s). This information must be provided in writing at the time the proposal is submitted.

SUBMISSION SPECIFICATIONS

Candidates are required to submit five (5) copies of the proposal, including attachments, provided in printed form. Electronic copies will not be accepted. Only complete proposals will be accepted up to **Friday, February 2nd, 2007 at 5:00 PM Eastern Standard Time.**

Please send complete proposals post, courier or deliver in person to:

Canadian Breast Cancer Foundation - Ontario Chapter
20 Victoria Street, 6th floor
Toronto, Ontario M5C 2N8
Attention: Vince Bowman, Associate Director of Allocations and Evaluation

We regret that submissions received after the deadline will not be considered.

TERMS AND CONDITIONS

The successful candidate will sign a contract with CBCF that specifies the contract services expected, deliverables, timelines, lines of accountability and payment schedule for Phase "A" .

The successful candidate will provide CBCF with a detailed project plan, schedule, budget for Phase "B", based upon consultations undertaken with all CBCF business units, for approval by CBCF. Upon approval of the Phase "B" plan, the successful candidate will sign a contract with CBCF that specifies the implementation services expected, deliverables, timelines, lines of accountability, milestones and payment schedule for Phase "B".

The successful candidate will report to the Associate Director of Allocations and Evaluation, and work directly with lead CBCF staff from all business units.

The Consultant(s) will be expected to participate in some meetings with CBCF staff and to discuss planning, preparations, progress, process issues and/or logistics with respect to conducting the project. The Consultant(s) may be expected to participate as needed and negotiated in meetings with the project task group.

Where applicable, proposals must clearly outline the use of sub-contractors, identify the specific work that will be sub-contracted, provide the name(s), qualifications and other pertinent information about the subcontractor in the same manner as information that has been submitted about the primary candidate. All information about the contractor(s) and subcontractor(s) will be considered during the proposal review process. If changes to the sub-contractor(s) are required during the review process or the work itself, the contractor must consult with CBCF in order to approve the change.

Data collected and all information developed to fulfill this work will become the property of the CBCF.

COMMUNICATIONS

The prospective bidders can ask the CBCF questions about this RFP process. Questions must be submitted in writing via email. No telephone calls will be fielded during the RFP process. All answers will be provided in writing via email. Questions should be sent via email to: Vince Bowman, Associate Director, Allocations and Evaluation vbowman@cbcf.org

SELECTION PROCESS

Each proposal will be assessed, at a minimum, according to the following criteria:

- Completeness of the proposal in relation to the criteria set out in this RFP.
- Proposal demonstrates a methodologically sound and innovative design. Identifies other innovative ideas and unsolicited benefits
- Proposal demonstrates how the project will address the key issues raised in this RFP
- Proposal presents a well-defined and complete plan to determine the detailed work breakdown structure, schedule, communications plan, risk management plan, quality assurance plan, milestones and budget.
- Proposal demonstrates the applicant's fundamental understanding of Project Management, software testing and implementation in a multi-faceted environment
- Proposal clearly describes how the methodology will successfully lead to the timely completion of the work according to the outlined objectives
- Proposal demonstrates the applicant's ability to consult and work collaboratively with CBCF – Ontario Chapter staff
- Outlines the qualifications, experiences and suitability of proposed staff.
- Demonstrates the Consultant(s) writing abilities.
- Demonstrates the Consultant(s) project management skills and expertise appropriate to the successful completion of the implementation processes.
- Demonstrates the Consultant(s) ability to successfully realize deliverables using a participatory/collaborative approach.
- Budget is appropriate, complete and justified exemplifying excellent value for cost. Selection of the successful candidate may not necessarily be the lowest priced bid for the work.