

COSTI Immigrant Services

CALL FOR PROPOSAL

**INTRANET DEVELOPMENT FOR WELCOME
CENTRES IN YORK REGION**

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Project Background:

COSTI Immigrant Services seeks a consultant to develop an Intranet platform for the Welcome Centre System in York Region. For information on COSTI please visit www.costi.org.

This Request for Proposals is for the design, development and implementation of an intranet using a share point platform for Welcome Centre Immigrant Services (WCIS) For additional information on the Welcome Centre visit www.welcomecentre.ca.

The Welcome Centre partnership includes: Catholic Community Services of York Region (CCSYR); Centre for Information and Community Services of Ontario (CICS); COSTI Immigrant Services (COSTI); Job Skills – Employment and Business Programs and Supports; and Social Enterprise for Canada.

In addition to the pilot site in Vaughan, four new Welcome Centres in York Region have recently opened their doors to help newcomers and their families get the services they need to build a better life for themselves in their new communities. Each Welcome Centre offers a one-stop shop approach to services by pooling the resources of community-based agencies under one roof. In addition to Settlement and Integration, Job Search Work Shops, Employment Supports, Language Assessment and Classes, Accreditation, Interpretation, Translation, Childcare and Occasional Child minding, the new Welcome Centres offer specific programs for newcomer youth women and seniors.

The organization, the centres, programs and support departments within the Welcome Centres rely upon the use of information technology in delivering integrated seamless services.

Currently, our primary e-tool is our website, www.welcomecentre.ca which provides information for newcomers to Canada. The Welcome Centres do not have an Intranet or Extranet site.

Welcome Centres require an interactive portal site that, in addition to providing one-way access to information related to Centres' activities, will also permit two way communications and interaction between Welcome Centres and its approximate 150 staff members at all levels.

Scope of work:

The Organization expects to award a contract for the project plan, design, build, testing and implementation of an Intranet. In addition, practices are to be established and WCIS staff are to be trained to operate, maintain and support the Intranet. The proponent will receive functional guidance from the Welcome Centre Intranet Working Group comprised of (Director of Education and Information Technology, General Manager of Information Technology, General Manager of Communication, System Development and Integration Specialist) The Proponent will also work with Principle Partners staff in the Welcome Centres in a collaborative framework.

The Intranet content will focus on static and dynamic content and will capture organizational resources and information repositories, communication tools, collaborative environments, search engine, document management systems for areas like: committees and working groups, governance, operational system and tools, agency or organizational templates.



Intranet access is to be provided for all WCIS staff with appropriate access level controls based on user privileges.

The solution architecture and design is to allow for additional content and functions to be added on with relative ease (minimum effort) and at minimal costs. This solution will be designed in a phased approach.

The contract is to provide an Intranet that will achieve the following goals:

- Enable quick and easy access to relevant information resulting in better decisions and more timely execution of tasks
- Enable improved efficiency in internal communication and further cultivate linkages and synergy within the corporate culture through inter-centre, inter-agency, cross jurisdictional program communication and interaction. The intranet will be integrated with the current WCIS IT infrastructure, client database(WCCR), documents and communication systems
- Provide quality content that is valued for assisting staff managing their work flow.

The components of the above goal are to be tested during usability & testing

Scope Elements: Design, Develop, Test and Implement:

- Create a functional framework or plan and a design document, including organizational, centre specific and departmental storyboards that specifies the key content and features to be delivered; Identify the critical graphical user interface (GUI) design concepts and incorporate in the storyboard for the different areas: WCIS main page, Centres, Service department, Agencies. Include in the design the appropriate elements so that the Intranet can easily be extended from the initial areas identified under scope of work to include the additional and/or remaining departments& functionalities out of scope.
- Create technical design documents & mapping, outlining the key Intranet configurations and design. Within the architectural diagrams and descriptions include the critical design element of having all records stored in SharePoint 2010 Records Centre;
- Create build and implement the Intranet development, QA (testing & usability) and production SharePoint 2010 environment.
- Create the plan to migrate or populate the information currently located in Document Folders/shared folders, Principle Partner agency files to the Intranet where appropriate;
- Develop and implement an Intranet governance model – related to the Intranet roles and responsibilities, centralized communication driver (how to keep content current and who has rights to publish and approve) and content management strategies
- Create and implement Intranet training. Training documents related to use, publishing, governance model and administration of Intranet sites;
- Design and implement highly effective search functionality afforded by the SharePoint 2010 environment.



Specification:

Based on experience and industry knowledge, it is required that the successful proponent include additional items that may be regarded as added value and include additional items that may have not be included and/or overlooked.

Content

Site Map

Standard Document Management system

Policy and Procedures

Provide with quick access to repository of information for current policies and procedures, guidelines, including but not limited to:

- Memorandum of Understanding
- Partnership & related agreements
- WCIS reports, studies and research documents
- Associate Partner Agreements and tools
- Committees and terms of reference
- Operational Manuals
- Financial
- Communications and Fundraising
- Purchasing policy and procedures
- Health and Safety Documentation

Self-service Finance and HR features for Principle partner agencies:

- Forms, procedures and policies
- Quick access to current Human Resources forms with immediate access to corresponding procedural and policy information

Organizational forms and templates

- Include standard organization templates, centres, program/department specific templates

Newsletters

- Provide immediate access to organizational/centre/program/marketing newsletters and announcements

Employee Directory Information

- Identify best practice display of information and structure
- Searchable

Business Links

- phone books, postal code lookup, driving directions, agency information or program details
- Utilize hyperlinks



Program Department/Division content

- Team sites
- Committee structure
- hyperlinks, tables and pictures

Announcements/What's New

- Global page/Centre Page/Program Page
- Staff changes, special events, etc.
- Contents formatted by a template so staff can create

New employee

- WCIS Orientation information
- Staff integration checklist

Interactive Functions

Highly effective search tool

- Based on industry best practices for search
- Consider importance of search tool's ability to search within actual documents (such as Word and PDF documents)
- Consider importance of hit highlighting within search results and documents

Marketplace/Bulletin Board

- Searchable;
- Content formatted by a template Events Calendar template for WCIS system, Centres or departments
- Collaboration zone/discussion forums
- Reference (media) library resources etc.

Training Center (out of scope)

- Offer quick reference online training/PD materials
- Capabilities for offering media rich training materials such as video & articulate Pro
- Consider integrating with Outlook/Exchange

Surveys

- Evaluation framework
- Tools consideration for survey design/layout
- Survey content results are to be stored in a database
- Client feedback

Architecture / Design Elements

Hosting and Administration Model(s)

WCIS will internally host the solution. Welcome Centre requires a strong focus from the proponent on knowledge transfer and operational planning to allow Welcome Centre to develop the required skills to host and operate the solution on an on-going basis.



Architectural Specifications:

- Use SharePoint 2010
- Hosted on Welcome Centre hardware at a Welcome Centre.
- Runs on Microsoft IIS 7 and integrated with Active Directory
- Integrated with Exchange 2007 (ready for Exchange 2010)
- Integrate with Office 2007 and Office 2010

Relevant Technical Environment:

Welcome Centre will use the following systems to enable Welcome Centre intranet:

- Server Operating Systems: Windows 2008, 2008 R2, 2003
- Database: MS SQL 2008, 2005
- Microsoft IIS 7

The following are other relevant platforms and technologies used:

- Microsoft Office 2007, 2010
- Microsoft Exchange Server 2007 (upgrade to Exchange 2010 planned for first half of 2011)
- Microsoft Communications Server
- Microsoft SCCM
- Microsoft Hyper-V

Content Approval process

- Enable role definition and assignment
- Appropriate level of workflow
- High level of ease of use is achieved for authoring, approval and publishing process ensuring content is conveniently maintained current

Defined look and feel design guidelines

- Define the ability to allow for personalized employee space, focusing on functionality such as individual web pages.
- Easy to navigate interface is simple, user friendly and logical.
- Unified design to ensure quality and usability

Functional Brand and Design

- Home Page that incorporates organization brand/identity and departments listed in scope of work and some features identified in Interactive Features
Printing capabilities maintains format for professional looking output
- Include organizational and departmental storyboards that specify key content and features to be delivered; identify critical graphical user interface
- Creative elements and services that may not be included within the scope of this RFP that may be procured separately. The successful proponent must include the following visual, experiential, and written elements for the site:



- Page layout – placement and organization of all visual page elements included on each page that accurately represents and reflects the organization’s brand including colour palette that represents the organization’s brand;
- Font, images, corporate logo,
- Appropriate placement and use of content and/or search page holders.

User authentication using

- Automatic login to the site based on domain login;
- Ability to log off the site and log in to the site again as a different user in the domain.
- Active Directory integration
- Expiration dates for published content

Content Management

- Access levels controlled in Active Directory based on user or groups.

Easy to set permissions for groups of staff

- Compared to one-by-one permission changing process

Remote access (out of scope)

- Designed to provide home access, travel access, public area kiosk access
- Consider providing some access capabilities for key information via BlackBerry mobile devices

Proposal Outline, Requirements and Evaluation:

The Proposal is to be a maximum of 25 pages, written in a minimum of 11 pt font, and containing the following sections:

- Corporate Profile
- Services Description
- Approach
- Architecture services
- Security and user management
- Administration services
- Creative element incorporation
- Knowledge transfer and training services
- Added value
- Proponent Resources
- WC or Agency Resources



- Proposed Organizational Chart
- Approach and Timeline
- Fee Structure & Change Request process
- References
- Terms
- Assumptions

Closing Submission Date and contact:

Proposals must be submitted no later than January 7, 2011, to the attention of:

Mr. Robert Cazzola,
Welcome Centre – Vaughan
9100 Jane Street, Building H,
Vaughan, ON
L4K 0A4

or via email to: cazzola@costi.org

For technical Inquiries: mladen@costi.org

****All technical questions and answers will be posted on the WCIS and COSTI websites.

Timeframe

Final completion date is March 31, 2011.

Budget

Total available budget is \$ 55, 370 including HST.

Instructions to Prospective Proponents

Bid Information and Minimum Requirements

The existing content and format are the basis upon which the work plan and deliverables will be developed.

Proposals must include proposed approaches and methodology, related background and experience of principals involved, references and budget (including per diem rates).

Proposals should be as thorough and detailed as possible so that the Evaluation Committee may properly evaluate your capabilities to provide the required services. Proponents are required to submit the following items as a complete proposal, and a written narrative statement including:

- A project charter showing all deliverables and all major project activities, including project goals, objectives, timelines, deliverables, equipment, licences, software needed, and limitations to revisions and edits (change requests)
- A project budget, including a breakdown of professional fees showing allotted time and related client consultation, direct costs, out-of-pocket and project related costs, and payment schedule.



- Proposals must demonstrate that the successful Proponent has the resources necessary to provide the requested services and clearly define limitations
- Ability to do research, technical and creative work, all of which will be required under this project.
- Resumes of the individuals who will perform the work outlined in this proposal, including their capabilities and experience in conducting and producing similar work in a timely manner.
- An account of the Proponent's professional capabilities and experience leading and conducting similar work, including a review of similar projects conducted, and at least three clients for whom similar projects have been completed.
- Provide a minimum of two samples of achieved projects of similar range and scope.
- Description of any value added services that can be provided by the successful Proponent to COSTI.
- Availability to meet with the Intranet working group and Welcome Centre Staff on a regular on-going basis.

Amendments

If an amendment is issued, it will be provided to all who were sent a copy of the RFP.

Disclosure of Proposal Contents

All proposal information, including detailed price and cost information, will be held in confidence during the evaluation process and prior to the time of Notice of Intent to Award is issued. Thereafter, proposals will become public information.

Conflict of Interest

Each proposal shall include a statement indicating whether or not the firm or any individuals working on the contract has a possible conflict of interest, and, if so, the nature of that conflict. The Selection Committee's determination regarding any questions of conflict of interest shall be final.

Ownership of Any Software Developed

Welcome Centres assumes ownership of any software developed.

Discussions with Proponents

The Welcome Centre Intranet Working Group may conduct discussions with Proponents limited to those whose purpose will be to ensure full understanding of the requirements of the RFP and proposal. Discussions will be limited to specific sections of the RFP or proposal.

Discussions, if held, will be after initial evaluation of proposals by the Selection Committee. If modifications are made as a result of these discussions, they will be put in writing. Following discussions, the Selection Committee may set a time for best and final proposal submissions from those Proponents with whom discussions were held. Proposals may be re-evaluated after receipt of best and final proposal submissions.

After receipt of proposals, if there is a need for any substantial clarification or material change in the RFP, an amendment will be issued.

Evaluation of Proposal:

Evaluation of the proposal will be undertaken by the Welcome Centre Intranet Working Group which comprises of COSTI Staff (Director of Education and Information Technology, General Manager of Communication, General Manager of Information and Technology and The Welcome Centre SDIS



Selection Criteria

Proponents shall be selected for interviews/presentations based on the information provided in the proposals and the following criteria:

- Professional Experience: Past experience and performance on consulting projects of similar size and scope to this project (provide references) and the quality of the firm's professional personnel to be assigned to the project and the quality of the firm's management support personnel to be available for consultation. Quality and success of plans produced for other clients.
- Project Approach: The proposal contains a clear and comprehensive project approach that addresses all of the objectives detailed under Statement of Needs and Deliverables. Quality of proposed plan and strategy.
- Related Work: samples are well organized, clear, and concise, with little or no analytical, grammatical, and/or typographical errors.
- Demonstrated track record in the full range of project management principles & project lifecycles including design, development, code promotion or technical design, implementation, quality assurance, usability & testing, training and product support
- Demonstrated experience in developing business and technical requirement
- Demonstrated experience in the design and production of communication tools such as Intranets. Demonstrated balance between strategic view of work and the execution aspects of projects.
- Superior technical skills and knowledge in design application software, database management, and Microsoft Office project.
- Qualifications and experience of Proponent in developing and implementing plans to other organizations and educational institutions.
- Strong and effective writing, organization, presentation and communication skills.
- Budget
- Reference from Clients

Proponents selected for interviews shall be evaluated on the basis of that interview according to the following criteria:

- Evaluation of Presentation: The Proponent's oral presentation and responses to questions were clear and well organized and demonstrated the Proponent's ability to communicate.
- Cost of Services: The overall pricing of the project and the flexibility for payment of the project.
- Other Criteria as deemed prudent.