

**Request for Funding Opportunities (RFO):
Funding Access Project (FAP)
Voluntary Sector Initiative**

Submitted to the IM/IT Secretariat,
Voluntary Sector Initiative, Industry Canada

RFO: FUNDING ACCESS PROJECT

1. PROJECT INTRODUCTION

The Voluntary Sector Initiative (VSI) is a joint undertaking between the voluntary sector and the Government of Canada. It is a unique opportunity to focus on the voluntary sector as one of the three pillars of Canadian society, equal in importance to the public and private sectors. The VSI had six Joint Tables and four working groups. One of the Joint Tables was the Information Management/Information Technology (IM/IT) Joint Table. [Appendix 1 provides further background information about the VSI and the IM/IT Joint Table.]

In 2002, the IM/IT Joint Table completed its work on identifying ways of building the capacity of the voluntary sector through the application of information management and information technology. The IM/IT Joint Table Report identified the following needs among others:

*Increase the cost-effectiveness of grant-seeking and grant-giving by developing a Web-based interactive funding service.
[Recommendation 4]*

The IM/IT Secretariat of the Voluntary Sector Initiative with the support of the IM/IT Advisory Group is proposing to address this recommendation in phases. This RFO addresses the first step in achieving this objective by seeking to provide national, cost-effective (or free access) to an existing Canadian grant-makers database, and to work with a database provider (the "Implementation Team") to add value-added services that facilitate grant-seeking and grant-making for the voluntary sector.

The Implementation Team must be either a non-profit organization – or must work in partnership with a non-profit lead agency – that has an existing database product that provides broad coverage of Canadian grant-making agencies. The Implementation Team must be credible to the sector, has a demonstrably sustainable service, and the technical capacity and willingness to provide enhanced national level services to the voluntary sector.

It is important that Implementation Teams meet the eligibility requirements of this

RFO.

The approved proposal will result in a consultation and negotiation between Industry Canada and the chosen party prior to a contribution agreement.

2. PROJECT DEFINITION

The voluntary sector has raised the issue of locating information about grants and grant-makers as a key constraint in the grant-seeking process. Although a number of grant-maker databases exist in the marketplace, access to these services is limited due to the access costs and perceived utility of these database services.

This project has two goals:

1. Enabling open access to information in an existing national database of grant-makers by licensing access to some or all parts of the database. A minimal level of free access beyond the basic tombstone data easily found through Google or 411 services is expected.
2. The development of other fee-based, value-added services that would enhance the effectiveness of the service as a national tool for streamlining the grant-seeking and grant-making process.

Potential Implementation Teams are encouraged to indicate other services and contents that may also provide benefit to the voluntary sector as a whole, in particular in streamlining the grant-seeking and grant-making process. Interested parties are strongly encouraged to share ideas that would help achieve the objectives of the Voluntary Sector Initiative and demonstrate a commitment to furthering community building within the sector. It is expected that the chosen Implementation Team will take a leadership role in guiding the voluntary sector and do so in a manner responsive to the sector.

Transparency and accountability

An organization undertaking work must be **accountable to the sector**. All work done under the VSI is for the common good of the voluntary sector and organizations must be willing to provide services with the intent of supporting and enhancing this common good. One of the purposes of the VSI is to encourage networking among voluntary sector organizations and to build communities of practice. The Implementation Team is expected to support this core activity through partnerships and outreach. The establishment of a voluntary sector board of governors for guiding the Implementation Team's work (if not already established) or other means for encouraging sector (grant-makers and grant-seekers) contributions is strongly encouraged.

There is an expectation that the Implementation Team will work closely with the IM/IT Secretariat, the IM/IT Advisory Committee and other voluntary sector stakeholders when appropriate. On matters of substantive importance pertaining to access, sustainability, governance, or legal matters, the advice of the Advisory Committee should be sought.

Sustainability Considerations

There is an expectation that services will be **accessible and affordable** to all members of the sector. The Implementation Team is expected to provide a sustainability plan for access and other value-added services developed to offset the provision of any free or low-cost services after the end of the project hence once federal funding ends.

Language and Accessibility

The regional, linguistic and client diversity of funding agencies must be represented in the database and services. **Access in both official languages** to the database and services must be supported in all applications. This includes all web interfaces, navigation, and value added content created specifically for the service. Linked content and collected documents do not need to be translated unless the content was created under the aegis of the VSI. Any intellectual access points (i.e.

subject terms) shall be provided in both official languages. Standard Web accessibility requirements must be met in all services.

Technology Plan

Interested organizations are asked to illustrate how their existing technology works and to provide details of existing or future plans for product development, *eg.* technical architecture, capacity planning, the use of open standards for description and data exchange, *etc.* Interested organizations are to have existing capacity or skills that can be used as a foundation for developing future services and applications.

The Voluntary Sector Initiative is strongly encouraging that future enhancement of services be done in an open manner and where appropriate, use open source software and standards whenever possible. Integration and interoperability are key operating principles for the development of VSI work components. The use of internationally recognized standards and best practices for data description, design, and interoperability is expected. Design and brand consistency is paramount. The use of open source software is strongly encouraged. If possible, new software development is to be avoided and should build on existing work.

3. PROJECT DELIVERABLES

Towards meeting the mission of this project, the following deliverables are expected.

1. **Provision of access to existing database (for example, a licensing arrangement to provide free access to certain tombstone data with affordable access to value-added services).**
2. **Provision of enhanced services for expanding the database and streamlining the grant-seeking and grant-making process, for example through the addition of grant application forms, deepening the database to include funding agencies not included (not-for-profit or government), broadening to include further key information, data translation, profile and personalization services, etc.**
3. **Monthly usage reports including financial report.**
4. **Consultation process with stakeholders to provide advice on how to enhance access and services (for example, usability testing, services planning, ensuring sustainable national access).**

4. EVALUATION CRITERIA

This RFO aims at identifying an Implementation Team who is capable of providing access to a database of information pertaining to grant-makers and who is willing to enhance their existing service to streamline the grant-seeking and grant-making process.

There is an expectation that the database coverage will be nationally comprehensive.

The IM/IT Advisory Group will evaluate each response based on the information provided below, taking into consideration the quality of response and make its recommendation to Industry Canada for approval.

Industry Canada will enter into a contribution agreement with the chosen organization. The contribution agreement will describe the deliverables, time lines and payment schedule for establishing access to the database and other enhancement work.

Interested parties, whether as individual organizations or consortia:

1. Must be a Canadian non-profit organization. If a consortium, the lead organization must be a Canadian non-profit organization. Commercial organizations interested in participating are expected to work as part of a consortium with the voluntary sector.
2. Must already provide access to an existing online database of Canadian grant-making organizations.
3. Must be willing to enhance existing products and services in line with the objective of streamlining the grant-seeking and grant-making process.
4. Must be able to demonstrate a credible and leadership presence in the Canadian voluntary sector.
5. Must have a willingness and/or ability to work cooperatively with other voluntary sector organizations and VSI projects.
6. Must provide a detailed budget of estimated costs (licensing, enhancement) to deliver the project.
7. Lead organization must provide proof of financial solvency and must demonstrate it can receive, manage and account for public funds in a responsible manner, and have the capacity to deliver the service. Please attach appropriate financial documentation.
8. Implementation Team must be willing to explicitly acknowledge the contribution of the Government of Canada and the Voluntary Sector

Initiative in the work.

No proposal will be accepted if the information required below is incomplete or if the proposal was received after the deadline.

All the information required is mandatory. All fields must be complete otherwise the proposal will not be evaluated.

Proposals must include the following:

1. Descriptive information about the organization as per section A below.
2. A document that addresses the evaluation requirements listed in section B below.
3. The project budget as per section C below.

A. DESCRIPTIVE INFORMATION

The following information is mandatory and should be presented in the order given below:

1. OFFICIAL ORGANIZATION NAME
2. ADDRESSES (street and/or mailing address)
3. CONTACT PERSON(S)
4. TELEPHONE NUMBER(S)
5. FAX NUMBER(S)
6. EMAIL ADDRESS(ES)
7. URL
8. DESCRIPTION OF THE MISSION OF ORGANIZATION (append brochures or related material if required.)
9. INCORPORATION NUMBER (MANDATORY) AND CHARITY NUMBER (IF AVAILABLE) (Proof of a legal entity that has been in operation for at least 2 years must be provided. Copy of incorporation papers must be attached to proposal).
10. YEARS IN OPERATION

11. FINANCIAL INFORMATION (Organization must provide proof of financial solvency. Organization must demonstrate it can receive, manage and account for public funds in a responsible manner, and have the capacity to deliver the project. Please attach appropriate financial documentation.)

B. EVALUATION REQUIREMENTS

All information is required and should be clearly addressed in the proposal in the order below. The Advisory Committee will evaluate proposals based on the following:

1. Provide a description of your organization's expertise and current governance in providing Internet web services.
2. Describe the grant-makers database that you are currently providing.
3. Describe your proposed strategy for providing free or cost-effective access to your database for grant-seekers across Canada.
4. Describe how valued-added services for streamlining grant-seeking might be developed, for example by deepening or broadening the database, addition of application forms, working relationships with funding agencies, personalization services, *etc.*
5. Provide a project plan and timeline for the delivery of services.
6. Describe the technical architecture for current and projected services.
7. Describe your relationships with the voluntary sector in Canada.
8. Demonstrate ability to deliver language and accessibility requirements.
9. Provide an estimate of costs to deliver this project (use supplied budget template).
10. Provide a sustainability plan for access to the services once federal funding ends.

C. PROJECT BUDGET TEMPLATE

	Estimated Total Cost	Implementation Team Contribution		IM/IT Program Contribution
		\$	In-Kind	
Salaries and Benefits - Project Management (includes management of contracts) - Support				
Administration				
Travel (specify) as per Treasury Board guidelines				
Communications, translation and Marketing				
Infrastructure (hardware, software, network connectivity; please specify)				
Other (specify)				
Total Cost of Project				

5. PAYMENT PROCEDURE

Industry Canada could finance up to 100 percent of the total cost of the project. All payments are made to the organization through a Contribution Agreement. Payment will be made on the basis of documented claims for reasonable eligible

costs incurred, to be submitted by the recipient not more frequently than monthly.

Each claim is to be accompanied by all costs being claimed, a brief report of the work completed in support of these costs, and be substantiated by such documents satisfactory to the Minister. Claims shall be certified by an officer of the recipient or by such other person satisfactory to the Minister.

The Minister may make advance payments on account of contributions in cases where it is critical for the success of the project. Such advances will be made in accordance with the Treasury Board Guidelines.

6. ADMINISTRATION

Industry Canada is the Department responsible for the IM/IT Program for the Voluntary Sector Initiative and will administer the Contribution Agreement (CA) with the Implementation Team. The agreement must meet the federal government laws and regulations including but not restricted to the Financial Administration Act.

The Implementation Team has the option to subcontract as required. Industry Canada will have the CA only with the Implementation Team and will hold that organization responsible for any activities it has subcontracted to other parties.

7. PROTECTION OF INFORMATION

All personal information provided in an applicant's proposal for a Contribution Agreement is protected under the provisions of the federal Privacy Act. The successful Implementation Team should be aware that the data on the number of staff, the objectives and activities of the organization and financial data are not protected under the Privacy Act and might be made accessible to anyone who would request them through the Access to Information Act.

8. INTELLECTUAL PROPERTY

The implementation team will hold and retain ownership of all intellectual property rights in the deliverables contemplated by the Project, and will obtain any necessary third-party authorizations, as required to carry out the Project,

from third parties who have intellectual property rights in any deliverable contemplated by the Project.

The implementation team will grant a perpetual, non-exclusive, irrevocable, royalty-free license to Industry Canada, the members of the bodies of the VSI and the IM/IT Advisory Group to use and access the database for evaluation and verification purposes only

9. DEADLINE FOR RECEIPT OF PROPOSALS

E-mail proposals must be received no later than 08-29, 2003 at midnight. Proposals received by mail or courier must be post stamped no later than 08-29, 2003.

10. DELIVERY OF PROPOSALS

Hard copies of proposals (with all attachments, i.e. financial statement, registration/incorporation copies, other handouts) must be delivered to:

Contact: Bernard Chabot, Manager
Industry Canada, IM/IT Secretariat
365 Laurier Avenue West, 2nd Floor, Ottawa ON K1A 0C8

Electronic versions of proposals, Sections A, B & C are also required. Paper attachments (i.e. registration or incorporation copies) are not required in electronic form but must be supplied in the above. Electronic versions must be submitted either in Microsoft Word or WordPerfect format to: IMIT@ic.gc.ca

Should you have any questions, please call (613) 990-7233.

APPENDIX 1: BACKGROUND

The Voluntary Sector Initiative (VSI) is a joint undertaking between the voluntary sector and the Government of Canada. It is a unique opportunity to focus on the voluntary sector as one of the three pillars of Canadian society, equal in importance to the public and private sectors.

The long-term objective of the VSI is to strengthen the voluntary sector's capacity to meet the challenges of the future, and to enhance the relationship between the sector and the federal government and their ability to serve Canadians.

In June 2002, the IM/IT Joint Table completed its work on identifying ways of building the capacity of the voluntary sector through the application of Information Management/Information Technology. The Joint Table submitted its report with program recommendations to the Minister of Industry and to the VSI Joint Coordinating Committee. The IM/IT Secretariat at Industry Canada is tasked with project management of this program with actual implementation being shared with the sector.

The IM/IT Joint Table strategy involves five main recommendations:

1. **Campaign targeting funders:** Encouraging funders to change their policies and procedures to permit IM/IT investments.
2. **Access to IT planning, hardware and software, training and technical support:** Giving sector organizations ongoing access to IT planning, expert advice, current hardware and software, training and technical support.
3. **Voluntary sector website/Portal:** An on-line location for the exchange of information and best practices for voluntary sector organizations and funders.
4. **Funding exchange:** A web-based interactive funding service for both funders and organizations seeking funding.
5. **Technology awareness campaign:** A campaign to raise awareness of the benefits of adopting and using technology effectively.

This RFO addresses recommendation # 4.

To answer this recommendation, Industry Canada is seeking to establish a relationship with an existing interested organization to provide free or low-cost access to grant-seeking information and to streamline the grant-seeking and grant-making process through enhanced services.

The IM/IT Secretariat of the Voluntary Sector Initiative with the support of the IM/IT Advisory Group is proposing to address this recommendation in phases. This RFO addresses the first step in achieving this objective by seeking to provide national, cost-effective (or free access) to an existing Canadian grant-makers database, and to work with a database provider (the "Implementation Team") to add value-added services that facilitate grant-seeking and grant-making for the voluntary sector.

The Table's strategy is designed to help voluntary organizations use technology to develop more effective ways for carrying out activities essential to their mission. It also supports the sector as a whole to develop a greater capacity to play its role as one of the pillars of Canadian society alongside the public and private sectors. Further information about IM/IT in the voluntary sector can be found in *Strengthening Voluntary Sector Capacity Through Technology* and VSI projects to coordinate IM/IT activities in the voluntary sector can be found at:

<http://www.vsi-isbc.ca/>