

# **Request for Funding Opportunities (RFO): Portal Development for the Voluntary Sector Initiative**

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

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# RFO: PORTAL FOR THE VOLUNTARY SECTOR INITIATIVE

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## 1. PROJECT SUMMARY

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:

*Strengthen the capacity of voluntary organizations to communicate and network by developing a Portal. [Recommendation 3]*

This Request for Funding Opportunities (RFO) addresses recommendation 3. Through this RFO, the IM/IT Secretariat of the Voluntary Sector Initiative is seeking the services of an organization (Implementation Team) to implement this recommendation. The Implementation Team will be a Canadian voluntary sector organization whose credibility is highly regarded in the sector and has the technical capacity and willingness to provide national services. The Implementation Team will be expected to play a leadership role in the voluntary sector and in providing national level services to the 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

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*Strengthen the capacity of voluntary organizations to communicate and network by developing a Portal.*

The voluntary sector Portal is to be the focal point for current and future national activities and services for the sector. The purpose of this Portal is to provide meaningful contents and access to services that are of benefit to the sector as a whole. It should be a catalyst in building a sense of community amongst the diverse organizations that characterize the sector.

Basic Portal website content and services that must be supported are:

### COMMUNITY BUILDING

An essential service for the Portal is the provision of a variety of communications support services to the voluntary sector. Most important among these are:

1. Support for development of **electronic mailing lists** (i.e. listserv) to support information exchange in the voluntary sector and various working groups or sectoral interests. A model (although not as comprehensive) for the kind of mailing list service envisioned is JISCmail (<http://jiscmail.ac.uk/>).
2. Provision of a **current awareness** service that documents activities and highlights resources of general interest to the community. Following web trends it is expected that "weblogs" and RSS syndication will be used and is to be encouraged. Other communications may also be supported, *i.e.* newsletter, chat rooms, messaging, *etc.* as secondary priorities.

### LIBRARY FUNCTIONS

The Portal is also expected to manage electronic resources and documents pertaining to the community. Many of these resources may be hyperlinks.

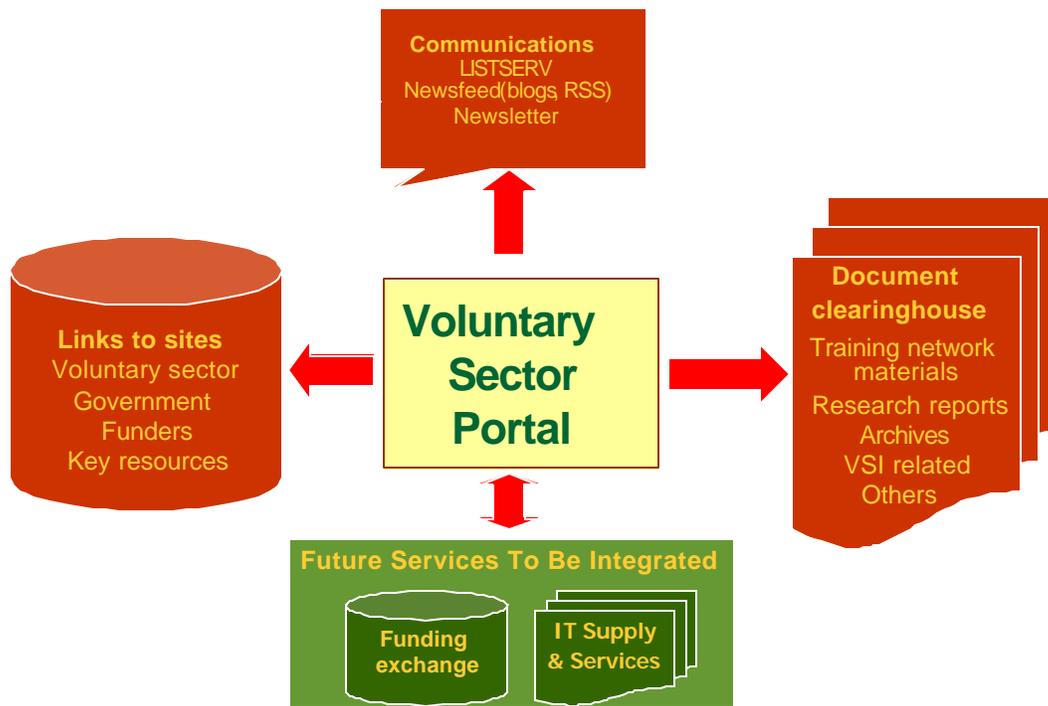
3. Manage and maintain a **database of links** to appropriate voluntary sector

organizations, government sites and other resources as appropriate. It is expected that the management of hyperlinks and documents will be done in a database using current standards such as Dublin Core and classified appropriately. Enabling this database to be accessible through the Open Archive Initiative (OAI) Harvesting Protocol would be appropriate and is encouraged. Links have to be annotated.

4. Act as **clearinghouse of documents** and references on subject matter of general interest to the voluntary sector, including but not restricted to:

- ?? basic information about the VSI and any documents pertaining to the sector,
- ?? managing documents & resources pertaining to other VSI components,
- ?? training & support materials,
- ?? online courses,
- ?? an archive of documents pertaining to past voluntary sector activities (VolNet) and other key resources.

## Voluntary Sector Basic Portal: Conceptual Model



Interested organizations must provide a detailed framework about how they would develop the above services. They must also illustrate how their proposed Portal architecture can be scaled to provide new services and applications as required ( eg. through capacity planning; the use of open standards for description and data exchange; open source software). The use of open source software for developing Portal services is **STRONGLY** encouraged where appropriate. The use of an open source platform is expected to be a preferred development environment for future work. Interested organizations are encouraged to indicate other services and contents that may also provide benefit to the voluntary sector as a whole.

Other applications will be integrated into the Portal at some future date. These additional services may include a **Funding Exchange** and an **ITSS: Information Technology Supplies & Services** product (marked as Future Services in the above diagram). These will be subject to separate RFOs.

### GUIDING PRINCIPLES

The VSI initiative is concerned that organizations work together for the broader benefit of the sector. Some of the thinking guiding this work is provided below.

### **Transparency and accountability**

An organization undertaking work must be **accountable to the sector** (e.g. networking, cooperation, conflict resolution). 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 the continuing development of 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 contributions is strongly encouraged.

There is an expectation that the Implementation Team will work closely with the IM/IT Secretariat, the IM/IT Advisory Group 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 Group 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 thoughtful consideration of how Portal services might be sustained after the federal funding ends and the kinds of value-added services that might be developed to offset the provision of any free or low-cost services.

### **Language and Accessibility**

The regional, linguistic and client diversity of the voluntary sector must be represented. **Access in both official languages** to services and contents 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

Organizations or consortia will provide a **well-considered technology architecture** and budget. It is expected that interested organizations have **existing capacity** or skills that can be used as a foundation for developing Portal services and applications. **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

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Towards meeting the mission of this project, the following deliverables are expected. The IM/IT Joint Table has provided some preliminary project planning to outline some of the expectations of the work interested organizations are to undertake. Interested organizations are strongly encouraged to revise or detail this project planning further and to add input and ideas that would contribute to meeting the mission of this RFO.

1. **Project plan and timetable.**
2. **Monthly status report including financial report.**
3. **Consultation process with stakeholders regarding decisions on domain name, brand, identity and design and to be vetted by the IM/IT Secretariat and Advisory Group.**
4. **A beta site is to be vetted by the IM/IT Secretariat, Advisory Group and selected voluntary sector organizations.**
5. **Management and administration of the Portal in a transparent manner to the voluntary sector (i.e. that policies and procedures are documented and accessible to sector agencies).**
6. **Promotion of Portal to the voluntary sector.**

7. Upon rollout of site, provision of website statistics based on real-time analysis (example: HitBox) will be required. Log file web statistics will not be adequate for assessment.

#### 4. EVALUATION CRITERIA

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This RFO aims at identifying organizations interested in developing a national Portal for the voluntary sector as outlined in this document. The IM/IT Advisory Group will evaluate each response based on the information provided below, taking into consideration the quality of response. The RFO will provide Industry Canada with a list of organizations that are willing to act as an Implementation Team as defined above. All proposals will be evaluated by the IM/IT Advisory Group for recommendation to Industry Canada and the final decision will be made by Industry Canada.

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 the work to be done.

Interested organizations, 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 be able to demonstrate a credible and leadership presence in the Canadian voluntary sector.
3. Must have a willingness and/or ability to work cooperatively with other voluntary sector organizations and VSI projects. Organizations interested in this work must demonstrate how it will be accountable to the sector.
4. Must demonstrate that regional, linguistic, and client diversity is represented.
5. Must provide a general budget of estimated costs to deliver the project.

6. 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 project. Please attach appropriate financial documentation.
7. Propose a strategy for ensuring that services will be self-sustaining or supportable after the federal funding ends.
8. Must have experience in managing large projects and demonstrate a capacity to develop electronic services and/or products. Provision of a technology architecture plan is required.

Interested organizations 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 successful applicant(s) will take a leadership role in guiding the voluntary sector and do so in a manner responsive to the sector.

Integration and consistency are essential. All VSI projects (current and future) are to be seen as a single national initiative under a common brand and with a single authority. Interested organizations are strongly encouraged to work in a consortium and seek out partners that can undertake the delivery of Portal services.

The Portal implementation team will oversee the delivery of all contents and services to the sector. Organizations will be expected to work cooperatively to ensure the integration and effective management of future applications and consistency of messaging to and from the sector.

**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 the 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. RATED REQUIREMENTS**

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

1. Provide a description of your organization's skills and expertise in providing Internet web services.
2. Describe previous comparable projects your organization has managed or administered.
3. Describe your proposed strategy (business plan) to implement and deliver

this project. Provide milestones and schedule for delivery.

4. Describe in detail the technical architecture for the Portal services to be provided.
5. Provide a short description of partnerships developed with other organizations or businesses (if any), including an explanation of their contributions to the delivery of this project.
6. Demonstrate ability to deliver language requirement.
7. Provide an estimate of costs to deliver this project as per the supplied budget template.

### C. PROJECT BUDGET TEMPLATE

|   | Estimated Total Cost | Implementation Team Contribution |         | IM/IT Program Contribution |
|---|----------------------|----------------------------------|---------|----------------------------|
|   |                      | \$                               | In-Kind |                            |
| Salaries and Benefits<br>- Project management (includes management of contracts)<br>- 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**

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Industry Canada is the Department responsible for the IM/IT Program of 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**

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All personal information provided in an applicant's proposal for a Contribution Agreement is protected under the provisions of the federal Privacy Act. Organizations successful in the competition 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**

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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 licence to Industry Canada to use and access the Portal for evaluation and verification purposes only. . Industry Canada's authorization will be necessary for the sale of the Portal to another party.

## **9. DEADLINE FOR RECEIPT OF PROPOSALS**

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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**

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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, 2<sup>nd</sup> 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](mailto:IMIT@ic.gc.ca)

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

## APPENDIX 1: BACKGROUND

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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 # 3.

**To answer this recommendation, Industry Canada is seeking an Implementation Team to implement and deliver a web-based Portal to provide information and services to voluntary sector organizations.**

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/>**

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