



Request for Proposals

I.T. and Support Systems Plan for ACCT 2024-2027

Summary

This document requests proposals from I.T. and support systems consultants for the development of a multi-year I.T. and Support Systems Plan (July 2024 - December 2027) for the Action, Chinese Canadians Together (ACCT) Foundation. Please carefully review the information and requirements in this Request for Proposals (RFP) and address any questions to the contact at the ACCT Foundation noted below.

RFP Delivery Instructions and Deadline

All submissions should be in electronic format and sent to the email address: events@acctfoundation.ca on or before December 22, 2023. The receipt of submissions will be confirmed to the sender via email. The ACCT Foundation may contact submitters for clarifications or further information on the proposals.

Notification of the successful proposal in this RFP process will be made on or before January 8, 2024. All proposals will remain confidential between the submitter and the ACCT Foundation.

Contacts

For enquires on the ACCT Foundation and this RFP, please contact:

<p>Teresa Woo-Paw Chair The ACCT Foundation Email: t.woo-paw@acctfoundation.ca</p>	<p>Kenneth Fung Program Manager The ACCT Foundation Email: k.fung@acctfoundation.ca</p>
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For more information on the ACCT Foundation, please visit: <https://acctfoundation.ca/>

November, 2023



I. Introduction

The ACCT Foundation is a non-partisan non-profit organization that builds the capacity of Chinese Canadian leaders committed to creating a more equitable society in Canada. Since its establishment in 2017, the ACCT Foundation has increasingly been recognized by the government, funders and the wider society as a credible national organization in advancing Chinese Canadian civic engagement and leadership development, and furthering education on racial equality of minorities. The ACCT Foundation has an annual operational budget of around \$250,000.

While having built a solid foundation of work in the past few years, the ACCT Foundation is at a critical stage of development that requires further strengthening of its organizational capacity for carrying out its vision and mission. As such, the ACCT Foundation is engaging in an organizational capacity development initiative comprising the updating of its strategic plan, and development of a fund development plan, marketing and communications plan and I.T and support systems plan.

This RFP is for the creation of a I.T. and Support Systems Plan for ACCT in 2024-2027. The plan will recommend strategies, measures and implementation plan for I.T. and support systems, including program management, learning management, HR, finance and administration systems, for ACCT. The I.T. and Support Systems Plan will form an integral part of the overall organization capacity development planning process.

II. Scope

The ACCT Foundation will work with consultants to build a I.T. and support systems plan which will include the following objectives:

- **Appropriate I.T. Infrastructure:** Evaluate and enhance the organization's I.T. infrastructure to ensure it supports the strategic, operational, fund development, and marketing and communication plans.
- **Integrated Systems:** Foster integration among different I.T. systems to support seamless collaboration and data sharing across various functions. Ensure that I.T. and related support systems align with the needs of program management, fund development, and marketing and communication efforts.

III. Project Outline and Deliverables

1. I.T. and Support Systems Plan

The consultant is required to create a customized plan for the ACCT Foundation. Specific requirements, contents and deliverables to be included in the written I.T. and Support Systems Plan are as follows:

- Assessment of Current Systems
 - Conduct a thorough assessment of the existing I.T. and support systems
 - Identify strengths, weaknesses, and areas that need improvement
- Alignment with Organizational Goals
 - Recommend I.T. and support systems and ensure that such systems align with the goals and objectives outlined in the strategic plan of ACCT
 - Each component should contribute to the efficient functioning of program management, fund development, and marketing and communications efforts
- Integration of Systems
 - Foster integration between different systems to streamline processes and enhance data sharing
- Program Management Support
 - Evaluate and enhance tools and platforms that support program management
 - This may involve project management software, collaboration tools, and databases that help manage program-related data efficiently
- Filing and Document Management
 - Improve filing and document management systems to enhance accessibility and version control
- Learning Management
 - Suggest a learning management system to support training and professional development initiatives of staff members
- Human Resources Management
 - Suggest a HR information system to enhance HR processes and employee management.
- Financial Management
 - Integrate financial management system with the overall I.T. infrastructure to support seamless fund development and financial reporting
- Data Security and Privacy
 - Implement robust data security measures to protect sensitive information related to program beneficiaries, donors, and other stakeholders
 - Ensure compliance with relevant data privacy regulations

- Scalability and Flexibility
 - Design systems that are scalable to accommodate future growth and flexible enough to adapt to changing organizational needs
 - This is particularly important for accommodating increased program activities, donor/funder databases, and communication channels
- Emergency Preparedness
 - Develop contingency plans for I.T. disruptions or emergencies
 - Ensure that critical data is regularly backed up, and there are protocols in place for data recovery
- Budget and Resources Requirements
 - Recommend the required yearly I.T. and support systems budget to successfully implement the plan, with due consideration to ACCT being a relatively small non-profit organization
 - Recommend other resources required for implementing the I.T. and support systems plan, e.g. related software, specific human resources.
 - The consultant should provide options with different resource requirements for consideration

2. Stakeholder Communication and Engagement

After the completion of the written I.T. and Support Systems Plan, the consultant is required to engage in related follow-up activities, including the following:

- Report back to ACCT Board on the recommendations
- Communicate with ACCT staff members on the recommendations
- Participate in meetings related to the integration of various plans under the overall ACCT organization capacity development planning process

Subject to further consideration, the ACCT Foundation may separately solicit the support of the consultant to provide training for ACCT on the implementation of the proposed support systems plan.

IV. Proposal Requirements

In creating a response to this request for proposals, the consultant should carefully consider the I.T. and support systems requirements and challenges represented by the unique mandate, scope and constituencies of the ACCT Foundation.



Proposals should clearly demonstrate the consultant understands ACCT’s requirements and outlines the methods by which the consultant proposes to create this plan.

At a minimum, the proposal should include:

- An **understanding** of the unique nature and scope of the ACCT Foundation
- A description of the **experience** of the consultants and/or consultant’s firm with I.T. and support systems and advising the design and implementation of such systems with organizations like the ACCT Foundation
- **References** for the company and individuals who will be involved in the creation of the plan
- If possible, provide **examples of previous written work** similar to the scope of the work under this RFP. Identifying information may be redacted if necessary.
- **Work Plan:** The proposed methodology, detailed timelines, milestones and activities of the consultant in creating the plan, including earliest start date and projected completion date
- An estimate of the time and requirements that the consultant will require of the ACCT Foundation to support the consultant’s creation of the plan
- **Service fee:** A detailed quote for the consultancy with breakdowns along with a proposed payment schedule tied to project milestones and/or deliverables.

V. Timeline:

- Background: In the overall organization development initiative, the strategic plan will be updated, and a fund development plan, and marketing and communications plan will be developed for ACCT by March 2024. The I.T. and Support Systems Plan should fully support the implementation of the recommendations of these plans.
- Development and writing of the I.T. and Support Systems Plan: January – April 2024
- Stakeholder communication and engagement: May 2024

VI. Proposal Evaluation:

Proposals submitted in response to this RFP will be evaluated according to the following criteria:

- Cost/benefit to the ACCT Foundation
- Consultant/firm relevant experience and qualifications
- Scope of work and detailed work plan
- Compliance with proposal requirements
- Value-added or Innovativeness