

TRUE PATRIOT LOVE REQUEST FOR PROPOSAL: EMBRACING MODERN TECHNOLOGY FOR ENHANCED EFFICIENCY

PART 1. OVERVIEW & IMPORTANT DATES

This Request for Proposal (“RFP”) is issued by True Patriot Love. We invite prospective candidates to submit a proposal for the opportunity to support us to implement *Embracing Modern Technology for Enhanced Efficiency*. This RFP sets out the requirements for proposal submissions including information about True Patriot Love, Terms and Conditions, Project Description/ Activities and Deliverables and Submission Instructions. Important dates include:

1. Issue Date of RFP	Monday, July 17, 2023
2. Last Day for Candidate Questions	Thursday, August 3, 2023
3. Last Day to Provide Responses to Questions	Friday, August 4, 2023
4. Proposal Submission Date	Friday, August 11, 2023 (by 5pm EDT) to hr@truepatriotlove.com
5. Proposal Review Date	Friday, August 18, 2023
6. Notification of Preferred Candidate & Contract Award Date	Monday, August 28, 2023
7. Work to Commence	Friday, September 15, 2023
8. Work to be Completed	TBD in consultation with approved candidate; NB: Work must be completed by Friday, June 14, 2024
9. Budget	Up to \$90,000 including HST
10. Location	Toronto, ON; while True Patriot Love will accept proposals from candidates outside of Toronto, it is preferred that the approved candidate meet in-person with True Patriot Love staff

PART 2. ABOUT TRUE PATRIOT LOVE & PROJECT DESCRIPTION

2.1 About True Patriot Love

True Patriot Love is Canada’s Foundation for the military community, working to support military members, Veterans, and their families at every stage of their journey. By working as a trusted partner with local charities, social enterprises, the Canadian Armed Forces and the federal and provincial governments, True Patriot Love advocates for the needs of military members and Veterans and ensures resources are directed where they are needed most.

True Patriot Love works closely with sector partners to support the evolving needs of servicemembers in Regular Force, on Reserve, and in transitioning to civilian life and as Veterans. This work centres around four key pillars:

- i. Supporting stronger military families, as spouses, caregivers, children, and youth are called upon to make profound sacrifices along with their loved ones;
- ii. Prioritizing well-being, by investing in mental health and transition programs amongst others;
- iii. Improving the rehabilitation and recovery journey through the power of sport, expeditions, and community-based programming; and,
- iv. Providing resources to organizations that foster connection with communities, whether it be through mentorship, volunteerism, or advocacy.

2.2 Project Description

True Patriot Love has emerged from the pandemic by expanding its support for beneficiaries, program partners and donors, strengthening its financial fundamentals, and instilling a desire to broaden and deepen its use of technology and software. With a committed staff in place, True Patriot Love aspires to take stock of its existing technology and software, workflows and policies and procedures, and determine how best to position and align the organization to ameliorate and improve its ways of working and impact. True Patriot Love is seeking external support to:

- i. Review its existing use of technology and software, internal workflows and associated policies and procedures, as it relates to finance, customer relationship management (CRM), fundraising and project management;
- ii. Recommend areas for True Patriot Love to improve its use of technology and software, and manners in which it can streamline, automate and integrate its work across the organization; and,
- iii. Implement the approved recommendations through the development of documentation, orientation and training.

PART 3. TERMS & CONDITIONS

3.1 Terms of Agreement

The terms of this agreement will commence upon the date in which the contract is awarded and continue until all requirements are met and deliverables are approved by True Patriot Love, unless terminated earlier. True Patriot Love is under no obligation to extend the scope of the work or engage the approved candidate for any subsequent work.

Additionally, in the event the event the approved candidate fails to accept the contract award, True Patriot Love reserves the right to accept the next qualified proposal.

3.2 Candidate Responsibility

True Patriot Love will review all proposals completed and received by the submission date (by 5pm EDT on Friday, August 14). All interested candidates are responsible to obtain clarification about the RFP, and may do so in writing by email to hr@truepatriotlove.com before or by Thursday, August 3 (***Candidates may not directly contact individuals employed by True Patriot Love or on the Board of Directors about this RFP***). Responses to candidate questions will be provided in a document that will be sent to all candidates by 5pm EDT on Friday, August 4.

All costs incurred in the preparation of the proposal are the responsibility of the candidate. Additionally, all supporting documentation submitted with the proposal will be retained by True Patriot Love and not returned.

True Patriot Love reserves the right to: not accept the lowest or any proposal submitted; and, to negotiate the cost and work schedule with the approved candidate. The approved candidate will respect True Patriot Love's privacy policy, and other applicable policies that will be included in the contract.

3.3 Copyright or Ownership

All documents, reports, working papers, or other documents submitted to True Patriot Love shall become the exclusive property of True Patriot Love, and not the property of the candidate.

3.4 Pricing

The proposal should identify the fees in Canadian Dollars for the work as outlined in Part 4. The activities and deliverables listed are the minimum requirements to be undertaken.

3.5 Insurance

The approved candidate shall, at their own expense, provide and maintain liability insurance. All the insurance shall be primary and not require the sharing of any loss by any insurer of True Patriot Love.

3.6 Cancellation

True Patriot Love reserves the right to cancel this RFP at any time and for any reason, and will not be responsible for any loss, damage, cost or expense incurred or suffered by any proponent as a result of the cancellation.

True Patriot Love reserves the right to cancel the contract at its sole and absolute discretion within 30 days' written notice to the consultant. The approved candidate will be entitled to be paid for all authorized work and expenses up to and including the date of cancellation.

PART 4. PROJECT ACTIVITIES AND DELIVERABLES

The activities and desired deliverables are presented below. Please note the following:

- The desired deliverables are the minimum expectations.
- The organization has two (2) periods of time in which access to True Patriot Love staff will be minimal on account of other priorities: October 16 – November 17, 2023; and, January 15 – February 16, 2024. Please take this timing into consideration in the development of your proposal.

ACTIVITY #1. Review and assess the use of **technology and software**, in relation to:

- a. Finance: QuickBooks (including the review of existing software, and our class system);
- b. CRM: Salesforce;
- c. Project Management: Asana; and,
- d. Fundraising: Raisin (including Double the Donation); Pardot; and, iWave.
 - Desired Deliverables
 - o Provide a detailed report, recommending areas in which the organization can leverage the existing software, and considerations for improvement.
 - o Review our class system and recommend areas for consideration and/ or revision to optimize our tracking and maximize our effectiveness.

ACTIVITY #2. Review and assess **internal workflows and policies and procedures**, as follows:

- a. Internal workflows in relation to QuickBooks, Salesforce, Asana, Raisin, Pardot, and iWave. Review the existing internal ways of working between teams as it relates to QuickBooks, Salesforce, Asana, Raisin, Pardot, and iWave.
 - Desired Deliverable
 - o Provide a detailed report, recommending areas to leverage and considerations for improvement in which True Patriot Love can streamline, automate and integrate its operations and ways of working across the organization.
- b. Finance Policies and Procedures. Review existing policies and procedures.
 - Desired Deliverable
 - o Provide a detailed report with recommended revisions.

ACTIVITY #3. Present report and recommended revisions to True Patriot Love staff for review and discussion and implement approved recommendations.

- Desired Deliverable
 - o Following discussions with True Patriot Love staff, implement approved recommendations by supporting the organization to develop necessary documentation, and orient and train staff, accordingly.

PART 5. PROPOSAL CONTENT & SUBMISSION INSTRUCTIONS

5.1 Proposal Content

Proposals should not exceed six (6) pages, and include the following:

- o Confirmation that you have reviewed the RFP.
- o A summary of your proposed scope of work.
- o A detailed work plan outlining the activities, deliverables and timelines.
- o A detailed budget summary by activity; the total budget will not exceed \$90,000 (Ninety Thousand Canadian dollars), including HST.
- o Relevant qualifications and experience; the proposal should include at least two (2) examples of work similar to the scope of work requested within this RFP.
- o References; the proposal should include three (3) references of individuals who can speak to their experience with the consultant in conducting projects of a similar scope. Information about each reference should include the individual/ organization's name (and contact person), email address, telephone number, and a brief description of the work completed and timing of the completion of the work.
- o A statement of the consultant's understanding of issues of confidentiality as applied to this project and disclosure concerning any real or perceived or potential conflicts of interest.

True Patriot Love reserves the right to ask for clarification from proposals that are shortlisted which may take the form of an interview. Additionally, True Patriot Love will not provide feedback about proposals that are not shortlisted.

5.2 Submission Instructions

All proposals are to be submitted electronically to hr@truepatriotlove.com, citing "Embracing Modern Technology for Enhanced Efficiency" in the subject line. Proposals must be submitted **by 5.00pm EDT on Friday, August 11, 2023**. Any proposals received after this time will not be considered.