

RFP: Digitization & Technology Strategy (DTS)

Issued: June 5, 2024

Submission Deadline: June 26, 2024

Reference: 24-024

Submit Proposals to:

Attn: Finance & Corporate Services

E-mail: corporateservices@cagbc.org

Format: PDF

Submission Details

All submissions responding to this request for proposal (RFP) must be emailed in PDF format to corporateservices@cagbc.org no later than June 26, 2024, at 12:00 p.m. ET.

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Submission questions

Interested applicants can submit clarification questions related to this RFP by email to corporateservices@cagbc.org up to and including June 13, 2024, 5:00 pm ET.

In its sole discretion, CAGBC may choose to consolidate responses or not address submitted questions for any reason whatsoever.

Overview

The Canada Green Building Council (CAGBC) is a non-profit organization that collaborates with the building, real estate, finance, and government sectors to realize the value of green buildings.

At CAGBC, we work with these stakeholders to accelerate their sustainability efforts and mitigate climate change risks for new and existing buildings. As a member-driven organization, we provide the tools, training, research, and services to integrate sustainability, resilience, and carbon reductions into real estate decision-making.

CAGBC's building standards and certification programs enable the disclosure and accountability of building assets and operations in line with evolving investor, occupier, and public policy expectations, especially regarding carbon.

To keep up with changing market needs, CAGBC requires a corporate-wide Digitization and Technology Strategy (DTS) that aligns with its current business needs and effectively positions the organization for future growth.

Purpose

Recognizing the need for an enhanced corporate-wide approach, CAGBC is issuing this Request for Proposal (RFP) to procure expertise to align our business objectives with the right digitization and technology solutions.

The RFP invites qualified applicants (i.e., individual firms, combinations of firms, and/or independent practitioners) with experience in digital transformation and innovation, business systems, client and member growth-oriented organizations, change management readiness and data management. The selected applicant will collaborate with CAGBC to develop a DTS that responds to CAGBC's identified business objectives.

Business objectives

The DTS must enable the following business objectives to be delivered:

1. **Enable new opportunities for business growth:** Leverage the power of digital transformation to support new opportunities for business growth.
2. **Contribute to client and membership growth and retention:** Enable CAGBC to acquire, maintain, and manage its client and membership base, delivering better data-driven insights and creating new opportunities for engagement and growth.
3. **Optimize sales and delivery functions:** Optimize and support the sales cycle for CAGBC product lines, including its building certifications, verification services, training and credentialing services, events and conferences.
4. **Drive excellent value and business intelligence:** Remove silos to better connect, analyze and leverage data from across the organization (membership, learning, building certification,

credentialing, research and advocacy) to derive meaningful business intelligence to guide its strategic priorities and business planning.

5. **Enhance overall experience and performance:** Improve overall efficiency and streamline business processes and practices for all core business lines, reduce operating costs and complexity, and greatly enhance client and member experience across the corporation, while ensuring the ability to deliver in both official languages.
6. **Strengthen market positioning:** Empower marketing efforts by strategically integrating digital tools, optimizing channels, enhancing client and member experiences, fostering collaboration, and ensuring data-driven decision-making for measurable success.

The DTS will also need to have regard for CAGBC's digitization and technology priorities:

1. **Business preparedness:** Enhance CAGBC's flexibility to meet changing market needs and adapt to client and member expectations to maintain market competitiveness.
2. **Integrated and scalable:** Align technology solutions across all departments to support CAGBC to adapt quickly and readily to changing business requirements, technological advancements, including AI applications, and market trends without significantly disrupting business practices.
3. **Interoperability:** Ensure digitization and technology solutions integrate seamlessly with existing/retained infrastructure, address compatibility issues, and remove barriers to data exchange (API).
4. **Enhance delivery:** Support the integrated delivery of core business lines and improve performance with better tools and systems (including AI and machine learning), standardized business practices and future risk mitigation.
5. **Enable data-driven decision-making:** Collect relevant data and use analytics and machine learning to make informed decisions and improve processes.
6. **Security and compliance:** Prioritize cybersecurity, data privacy, and regulatory compliance to protect devices, networks, and data.

Business technology and systems background

CAGBC's primary enterprise platform is iMIS 2017 (ASI) version 20.2. iMIS has served as the "backbone" of CAGBC's operational functionality using desktop applications and on-site SQL servers. iMIS was introduced as CAGBC's comprehensive enterprise platform in 2011 to serve as its unifying customer relationship management (CRM) and data platform to administer membership, events, storefront (sales), education (Learning Management System-LMS), website (via the iMIS RiSE platform), and other SQL customizations needed to deliver business needs such as for certification.

In 2019, CAGBC transitioned from a traditional in-house server-based model to a robust cloud-based platform. Significant systems and technology investments made since 2019 have included:

- Conversion to Microsoft Office 365 suite and SharePoint to administer all desktop functionality.

- Decoupling and winding down iMIS RiSE and transitioning all web platforms to WordPress (drawing on various third-party apps and using SQL to store content) while keeping all the necessary iMIS 2017 integrated functionality to manage the storefront and other business practices.
- Using Higher Logic to facilitate communication with members and clients, which maintains CAGBC's contact lists and manages its compliance requirements with Canada's anti-spam legislation (CASL) while continuing to draw on iMIS 2017, where all user information is stored and processed in support of transactions.
- Transitioning to a new learning management platform while maintaining necessary integrations with iMIS 2017 to facilitate storefront transactions and user profiles.
- Updating our accounting software to cloud-based services and the use of PayWorks.
- Introduction of a comprehensive cybersecurity approach which draws on various service providers and industry best practices.

While these investments have supported CAGBC's efforts to enhance overall productivity, improve the delivery and user experience, and reduce internal efforts, there remain technology and system needs, including removing data siloes, reducing manual work, simplifying and standardizing workflows and ensuring we have access to business-critical data for decision making.

Among the organizational challenges:

Data and Workflow

- Use of third-party apps due to limitations in the current system for event planning and registration tracking.
- Reliance on MS Access databases and/or Excel files instead of tailored applications for comprehensive business management.
- Ineffective utilization of collected data and a lack of understanding of proper data structures to improve business practices.
- Limited ability for interoperability and data sharing among platforms (data silos).
- Challenges with reports, standardized metrics, and user (member and client) information alignment.

Systems and Solutions

- Uncertainty about the most effective software options for routine tasks relative to existing and new business practices.
- Limited training on comprehensive systems and established platforms such as MS 365, leading to inefficiencies and underutilization of technology.
- Insufficient documentation and guidelines for system usage approach/rationale and troubleshooting.
- Dependence on third-party vendors, leading to additional work and costs and lack of support for outdated systems (e.g., iMIS 2017).

- Complex procedures and workflow processes resulting from misaligned systems (i.e., technology and app applications) and processes with current and future business practices.

These needs underscore the importance of a DTS for CAGBC to support business goals and processes and enable growth by working with us to understand the integrated solutions, data management enhancements, system upgrades, and support structures and documentation we need to achieve process streamlining and greater efficiency and effectiveness.

Scope and Stages

The successful applicant will collaborate closely with CAGBC to develop and implement an all-encompassing DTS, addressing key areas such as innovation, client and member growth, technology optimization, and change management readiness.

The applicant's approach should follow the stages below. It should start by defining and aligning needs related to CAGBC's business objectives. Then, it should uncover gaps and opportunities by assessing the current state and providing an unbiased perspective on improvement areas. Subsequently, the applicant must develop a comprehensive strategy that maps out organizational activities with systems and technology needs, focusing on capabilities, internal culture, and tangible outcomes. This includes identifying key measures (KPIs) and early wins to prepare for implementation.

Applicants may substitute, modify, or add additional stages and associated activities where they determine them necessary. As part of the scope response, applicants are encouraged to detail their approach to identifying system inefficiencies, propose strategic innovations, and convey their methodology for developing the DTS in alignment with CAGBC's business objectives.

Regarding the timeline for delivering the stages, the applicant should apply best business practices relative to their experience to ensure the identified CAGBC business outcomes for the DSTS are achieved. Ultimately, CAGBC seeks a complete DTS to implement by March 2025.

Stage One: Define The Need

The stage should:

1. Confirm what CAGBC seeks to achieve with the DTS (i.e., a shared understanding of how technology and digitization would align with CAGBC's business objectives and impact on operations.)
2. Identify and evaluate the systems and technology issues that must be addressed at both the enterprise and department levels.
3. Consider what needs to be accomplished to define a win and prepare CAGBC for future opportunities.

Outcome of stage: CAGBC management effectively engaged, CAGBC business objectives clarified and reaffirmed, systems and technology issues clearly articulated, and the applicant and CAGBC fully aligned on the outcome(s) that needed to be achieved with the DTS.

Stage Two: Uncover Gaps & Opportunities

The stage should:

1. Review CAGBC's current tech stack and established processes relative to business practices (i.e., carry out a current state and gap analysis to evaluate the operating model, technology platforms, integration, customer service, and risks associated with the status quo)
2. Assess the current tech stack and established processes relative to an identified desired end state (i.e., outline what's needed to bridge identified gaps in people, processes, and technology relative to CAGBC's business objectives).
3. Identify an ideal future state(s) relative to systems, data, and technology solutions/options to achieve CAGBC business objectives, resolve issues, and support growth opportunities (i.e., a range of options to be evaluated that outline how technology and digital platforms can be leveraged to optimize operations and increase CAGBC's competitive advantage).

The objective of the assessment should be scoped/limited to enabling the applicant to gain adequate insight and to document known or necessary issues, bottlenecks, inefficient internal processes, silos, wasteful complexity, and lack of standardization that does not create value for CAGBC to support the drafting of an ideal future state. CAGBC is not seeking applicants to conduct an audit level assessment and documentation of existing processes (process mapping) and client and member journey mapping.

Outcome of stage: Comprehensive situational assessment of business readiness (i.e., tech stack relative to current associated business practices) and the identification of the ideal future end state required to win (i.e., alignment of and selection of system(s) and technology and processes that achieves CAGBC's business priorities).

Stage Three: Establish A Roadmap & IT Governance

The stage should:

1. Establish an actionable Roadmap and plan that:
 - a. Effectively considers CAGBC's immediate and long-term growth needs.
 - b. Provides a recommended solution approach (i.e., a combination of platforms/solutions) and identifies key integration points between platforms.
 - c. Outlines a *sequential* list of projects/initiatives relative to agreed-upon business priorities by CAGBC to facilitate scale and growth.
 - i. The list of projects/initiatives are to include:

- ii. An impact/effort assessment and budget range (i.e., *high-level cost estimates for selection, procuring, implementation, oversight/project management*).
 - iii. Differentiate between corporate-wide and department-level needs.
 - iv. Incorporate criteria for evaluating new technology and systems to support CAGBC's business objectives.
2. Evaluate IT governance (policies, practices, and capabilities) relative to the proposed Roadmap and suggest what investments and updates are needed to facilitate effective IT governance.

Outcome of stage: A comprehensive road map and plan for how CAGBC will achieve its desired end state, as well as an agreed-upon list of initial projects/initiatives that includes high-level cost estimates that will put CAGBC on the path to achieving a successful DTS.

Stage Four: Engage & Execute

See the section on assumptions and constraints related to requests for Stage Four.

Requirements of Applicant

The expected minimum level of skills, knowledge, and/or abilities of the applicant include:

1. Overarching:
 - a. Ten (10) plus years of relevant experience in consulting, technology strategy, process improvement, change management, and strategic planning.
 - b. Have a proven track record of delivering similar projects for industry associations and organizations of comparable size and complexity in business service offerings.
 - c. Demonstrated strong communication, facilitation, project management, and interpersonal skills.
 - d. Possess a comprehensive understanding of strategic planning principles, frameworks, and digitization/technology roadmap development that enables alignment with organizational objectives.
2. Solution Architecture and Technology Strategy:
 - a. Strong background in analyzing complex tech stacks and mapping current and future states aligned with organizational growth plans.
 - b. Demonstrated ability to identify gaps, redundancies, and efficiency opportunities within systems, data, tools, and platforms.
3. Process Mapping:
 - a. Have experience mapping core operational and management processes, identifying inefficiencies, and recommending improvements.
 - b. Demonstrated expertise in streamlining processes, reducing complexity, and promoting standardization.
4. Customer Journey Mapping:
 - a. Exhibited an understanding of customer journey mapping techniques and the ability to uncover insights into customer needs, pain points, and internal process inefficiencies.

- b. Demonstrated capability to enhance client/member experience and drive business value through customer journey analysis.
5. Change Management and Readiness:
 - a. Showcased proficiency in change management methodologies and practices, empowering teams and fostering organizational resilience.
 - b. Addressed challenges related to internal culture, training, and readiness for organizational transformation.

Assumptions and Constraints

CAGBC may choose to contract separately with the successful applicant based on hourly rates submitted by staff category through the RFP to facilitate the implementation of the DTS. Applicants will be asked to submit a detailed proposal.

Terms and Conditions

1. Information throughout the application process should be considered confidential.
2. The applicant will be retained using CAGBC's master consulting agreement.
3. All information, recommendations and reports will become the exclusive property of CAGBC. Applicants should be prepared to license materials used and created during the agreement with CAGBC.
4. The CAGBC is not bound to choose any of the submitted applicants.
5. The successful Proponent may be required to sign a Conflict of Interest and Non-Disclosure agreement at a subsequent stage.
6. Key success factors include on-time and on-budget delivery, responsiveness, and approval of the quality of work from CAGBC senior management.

Key Dates

CAGBC reserves the right to adjust these dates at its sole discretion.

- Requests for Proposals Issue Date – June 5, 2024
- Deadline for Questions – June 13, 2024, 5 pm ET
- Deadline for Addenda – June 18, 2024, 5 pm ET
- Submission Deadline – **June 26, 2024, 5 pm ET**
- Anticipated Contract Award Date – July 19, 2024, 5 pm ET

Submission Structure and Evaluation Criteria

The final applicant selection will be based on a balance of criteria, including expertise, experience, and cost.

Submission Format

Applicants will include no more than ten (10) pages plus any specific appendices as a **PDF**:

1. **Executive summary** (1 pg max)
2. **Overview**: An overview of the applicant (1 pg max).

3. **Approach:** Outline your unique approach to the work, including team, proposed meetings, and additional resources (3 pgs max)
4. **Methodology:** Provide an overview of how you will meet the RFP objectives, including any deliverables or inputs from CAGBC required and detail your experience with similar work. (3 pgs max):
 - a. Outline how you will achieve each stage of the scope of work.
 - b. Include a timeline to complete each stage of the scope of work, including primary milestones for necessary signoff to enable the advancement of the scope of work.
 - c. Anticipated LOE/expected contribution from CAGBC staff in terms of time for all stages.
5. **Supplementary materials:** In an Appendix B not to exceed five (5) pgs max, provide:
 - a. Three (3) professional references, email and phone numbers, from past clients on similar projects.
 - b. Two (2) or more examples of relevant past work, such as links to workshops presented or previous frameworks, reports, or strategies.
 - i. The applicant should showcase their expertise in simplifying complex processes and enhancing customer experience highlighting significant improvements achieved.
 - c. The CV of the applicant or multiple CVs if multiple team members will provide services.
6. **Budget:** Provide a detailed budget that aligns with the RFP scope phases in Excel format See also Appendix C.
 - a. Breakdown of overall cost per stage/phase of the project.
 - b. Identify the hourly rates for the applicant team members' staff.
 - c. State separately and in detail (transportation, accommodation, per diem etc) the costs anticipated for delivering the scope of work.

Proposal Evaluation Criteria

CAGBC will evaluate all submissions using the following weighted system:

Stage 1: Mandatory Submission Requirements	(Pass/Fail)
<i>Proponents must receive a PASS in Stage 1 to proceed to Stage 2.</i>	
<i>To receive a PASS in this evaluation stage, the Proponent's Proposal must be complete and compliant with the Mandatory Submission Requirements below.</i>	
1. RFP Proposal Submission Form	
Submission File 1: RFP Proposal Submission Form (satisfactorily completed and signed, presenting no risks to CAGBC. See Appendix A.	Pass
2. Technical Proposal	
Submission File 2: Technical Proposal – File 1 must include the submission requirements for Stage 1 and Stage 2.	Pass
Important: The Technical Proposal File 1 – Must <u>not</u> contain Financial Proposal pricing information or the Proponent's Proposal will be disqualified.	

The Technical Proposal is not to exceed 10 pages, including Appendix B – Supplementary Materials, but <u>excluding</u> the cover page, table of contents, Appendix A – Proposal Submission Form, and Appendix C – Financial Proposal.	
3. Financial Proposal	
Submission File 3: Financial Proposal – must be submitted in Excel format as a separate file. See Appendix C	Pass
Stage 2: Technical & Financial Proposal Evaluation	(100%)
<i>To score maximum points, Proponents should be fully responsive to all Rated Criteria</i>	
Section A: Executive Summary	10%
<p>A1: Provide the Proponent’s firm background, including the following:</p> <ul style="list-style-type: none"> a) Introduction and a brief history, including the year the business/organization was established. b) Core competencies and services delivered by the Proponent. c) Demonstration of excellent customer service and project management <p>Please note: If the delivery of the Services will involve the use of <u>subcontractors</u> or if the Proposal is presented as a potential <u>joint venture</u> or <u>partnership</u> between two or more partners or companies, then please provide the information requested from this section for ALL/ANY related parties:</p> <p>Failure to do so, where applicable, will result in a lower score.</p>	
Section B: Qualifications	25%
B1: Demonstrate considerable direct expertise with similar projects.	
B2: Provide summaries of two (2) relevant projects completed in the last 5 years.	
B3: Provide three (3) appropriate references.	
B4: Demonstrate ability to perform the stated scope at the highest level.	
<p>B5: Describe the resourcing approach, including:</p> <ul style="list-style-type: none"> a) Curriculum vitae for each named Team Lead and proposed Key Team Members, demonstrating their qualifications and experience in the proposed roles, as well as the levels for which they are proposed. b) The reporting relationship between all team members. (Team Lead and all Key Team members) <p><i>*Please note the following role and role level guidance: Junior = a minimum of 1-3 years of experience delivering the Service Intermediate = a minimum of 4-9 years of experience delivering the Service Senior = a minimum of 10+ years of experience delivering the Service</i></p>	
Section C: Functional Approach	25%
<p>C1: Workplan – Present a workplan on how the Services will be delivered, referencing the Scope & Stages section of the RFP, and describing how the Proponent plans to perform based on its experience. Include:</p> <ul style="list-style-type: none"> a) An overview on the ability to meet the project deliverables. 	

<ul style="list-style-type: none"> b) An outline of how each stage of the scope of work will be achieved. c) A timeline to complete each stage, including primary milestones for necessary signoff to advance the scope of work. d) Anticipated contribution from CAGBC staff for all stages. 	
C2: Communications & Reporting - Describe how the deliverables will be communicated to CAGBC and the frequency of status updates during the delivery of the Services.	
C3: Quality Control - Describe the quality control plan that will be used to monitor and deliver the Services scope successfully.	
Section D: Project Cost (In Excel Format)	40%
D1: Summary of overall cost per stage/phase of the project.	
D2: Blended Hourly Rate & Roles for all Team Members	
D3: Detailed budget for each stage/phase of the project, showing the method and basis of compensation. For each stage include: <ul style="list-style-type: none"> a) Details of the services, hours, and fee rates b) Details for any additional costs, such as transportation, accommodation, per diem, anticipated for the delivery of the scope of work 	
Stage 3: Consensus Ranking	100
For respondents that satisfy all mandatory and minimum scoring threshold requirements, their technical evaluation scores will be re-assessed for consensus and a ranked list based on the Respondent's' total score will be generated for award from highest to lowest.	100