

Request for Proposals

RFP Number: 007 Date: December 10th 2021

Closing Time: Proposals must be received **before** 2:00 PM EST on January 19th 2022

DELIVERY OF PROPOSALS: Proposals must be in English and must be submitted by email, in accordance with the requirements set out in Section 2.2, and must include a copy of this cover page that is signed by an authorized representative of the Proponent that confirms the Proponent's intent to be bound.

Email Submission: Proponents must submit an electronic proposal by email. Proposals submitted by email must be submitted to shahzad.gidwani@cimmo.org and youssef@cimmo.org in accordance with the instructions in Section 2.3 of this RFP.

Confirmation to participate in the proposal should be received by 2:00 PM EST on December 20, 2021

Proposals must be received before Closing Time to be considered.

A proposal is deemed to incorporate the Confirmation of Proponent's Intent to be Bound below, without alteration.

CONFIRMATION OF PROPONENT'S INTENT TO BE BOUND:

The enclosed proposal is submitted in response to the referenced Request for Proposals, including any Addenda.

By submitting a proposal, the Proponent agrees to all the terms and conditions of the RFP, including the following:

- a) The Proponent has carefully read and examined the entire Request for Proposals.
- b) The Proponent has conducted such other investigations as were prudent and reasonable in preparing the proposal; and
- c) The Proponent agrees to be bound by the statements and representations made in its proposal.

PROPONENT NAME (please print): _____

NAME OF AUTHORIZED REPRESENTATIVE (please print): _____

SIGNATURE OF AUTHORIZED REPRESENTATIVE: _____

DATE: _____

CIMMO CONTACT: Enquiries related to this RFP, including any requests for information or clarification, may only be directed in writing to the following person who will respond if time permits before the Closing Time. Information obtained from any other source is not official and should not be relied upon. Enquiries and any responses providing new information will be recorded and posted or otherwise distributed to prospective Proponents.

[Shahzad Gidwani, Vice President Marketing and Communication]
[Shahzad.gidwani@cimmo.org]

Questions related to this RFP to CIMMO will be treated as follows:

All questions to be sent no later than 2:00 PM EST on January the 6th 2022

All questions will be answered no later than 2:00 PM EST on January 11th, 2022

PROPONENTS' MEETING:

A Proponents' meeting **will not** be held.

ENVIRONMENTAL CONSIDERATIONS FOR PROPOSAL DELIVERY:

CIMMO encourages Proponents to consider submitting an electronic proposal if that submission method is provided for on the cover page.

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1 SUMMARY OF THE OPPORTUNITY

The objective of this RFP is to procure Sales and Operations support services (supported by CIMMO volunteers) who will be responsible for:

- a) Growing the current Chartered Professional Marketer (“CPM”) and Certified Marketer (“CEM”) membership base, as well as maintaining renewal of memberships:
 - i. Maintaining memberships: acting as the registrar to upload and maintain records, issue certifications, and manage the billing process.
- b) Growing CIMMO’s current general membership base.
- c) Growing the number of institutions that have their marketing programs accredited by CIMMO.
- d) Identify institutions to be partners of CIMMO, create relationships with said institutions, onboard said institutions, work with CIMMO to create terms of the partnerships, maintain relationships and renew partnerships.
- e) Re-Design and maintain CIMMO’s web page. This is an end to end project which will require a separate detailed discussion.
- f) Develop, maintain and post to CIMMO’s social media channels, including but not limited to Instagram, LinkedIn, Facebook & Tik Tok. Develop a PR strategy with support and guidance from CIMMO’s executive team.
- g) Develop and maintain CIMMO’s sales channel and CRM software.

Unless an exception applies as described in Section 2.29 b), as a condition of Contract finalization, the successful Proponent will be required to provide CIMMO with a Tax Verification Letter. Please see Section 2.29 for further details. As set out in Section 2.29, CIMMO will be unable to finalize a Contract with a Proponent that is unable to produce a Tax Verification Letter as a part of Contract finalization, if required.

Further details as to the scope of this opportunity and the requirements can be found within this RFP.

2 RFP PROCESS RULES

2.1 Definitions

Throughout this Request for Proposals, the following definitions apply:

“Addenda” means all additional information regarding this RFP, including amendments to the RFP;

“Closing Location” includes the location or email address for submissions indicated on the cover page of this RFP;

“Closing Time” means the closing time and date for this RFP as set out on the cover page of this RFP;

“Contract” means the written agreement resulting from the RFP executed by CIMMO and the successful Proponent;

“Contractor” means the successful Proponent to the RFP who enters into a Contract with CIMMO;

“CIMMO Contact” means the individual named as the contact person for CIMMO in the RFP;

“Government Electronic Mail System” or **“GEMS”** means the electronic mail system of CIMMO;

“CIMMO” means the Chartered Institute of Marketing Management of Ontario issuing this RFP;

“must”, or **“mandatory”** means a requirement that must be met in order for a proposal to receive consideration;

“Proponent” means a person or entity (excluding its parent, subsidiaries, or other affiliates) with the legal capacity to contract, that submits a proposal in response to the RFP.

“proposal” means a written response to the RFP that is submitted by a Proponent.

“CIMMO” means the Chartered Institute of Marketing Management of Ontario.

“Request for Proposals” or **“RFP”** means the solicitation described in this document, including any attached or referenced appendices, schedules or exhibits and as may be modified in writing from time to time by CIMMO by Addenda;

“should”, **“may”** or **“weighted”** means a requirement having a significant degree of importance to the objectives of the Request for Proposals; and

“Tax Verification Letter” means a letter issued by the proponent accountant or Canada Revenue Agency to

verify that a Proponent meets the corporate income tax filing obligations and provincial sales tax (PST) filing and payment obligations, which may be required to be produced by a Proponent as a condition of Contract finalization, as described in Section 2.29.

2.2 Acceptance of Terms and Conditions

Submitting a proposal indicates acceptance of all the terms and conditions set out in the RFP, including those that follow and that are included in all appendices and any Addenda.

A proposal must be signed by a person authorized to sign on behalf of the Proponent with the intent to bind the Proponent to the RFP and to the statements and representations in the Proponent’s proposal. A scanned copy of the signed cover page of this RFP is acceptable as is a cover letter identifying the Proponent, identifying the RFP and including a signature of an authorized representative of the Proponent that confirms the Proponent’s intent to be bound.

2.3 Submission of Proposals

- a) Proposals must be submitted before Closing Time to the Closing Location using one of the submission methods set out on the cover page of this RFP. Proposals must not be sent by fax, except in the circumstances set out below. The Proponent is solely responsible for ensuring that, regardless of submission method selected, CIMMO receives a complete Proposal, including all attachments or enclosures, before the Closing Time.
- b) For electronic submissions, the following applies:
 - (i) The Proponent is solely responsible for ensuring that the complete electronic Proposal, including all attachments, is received before Closing Time.
 - (ii) The maximum size of each attachment must be 20MB or less (Proponents are solely responsible for ensuring that email proposal submissions comply with any size restrictions imposed by the Proponent’s internet service provider);
 - (iii) Proponents should submit email proposal submissions in a single email and avoid sending multiple email submissions for the same opportunity. If the file size of an electronic submission exceeds the applicable maximum

size, the Proponent may make multiple submissions to reduce attachment file size to be within the maximum applicable size; Proponents should identify the order and number of emails making up the email proposal submission (e.g., “email 1 of 3, email 2 of 3...”);

- (iv) For email proposal submissions sent through multiple emails the CIMMO reserves the right to seek clarification or reject the proposal if the CIMMO is unable to determine what documents constitute the complete proposal;
- (v) Attachments must not be compressed, must not contain a virus or malware, must not be corrupted and must be able to be opened. Proponents submitting by electronic submission are solely responsible for ensuring that any emails or attachments are not corrupted. CIMMO may reject proposals that are compressed, cannot be opened or that contain viruses or malware or corrupted attachments.
- c) For email proposal submissions, including any notices of amendment or withdrawal referred to in Section 2.9, the subject line of the email and any attachment should be clearly marked with the name of the Proponent, the RFP number and the project or program title.
- d) CIMMO strongly encourages Proponents using electronic submissions to submit proposals with sufficient time to complete the upload and transmission of the complete proposal and any attachments before Closing Time.
- e) The Proponent bears all risk associated with delivering its Proposal by electronic submission, including but not limited to delays in transmission between the Proponent’s computer and CIMMO Mail System or Mail service.
- f) While CIMMO may allow for email proposal submissions, the Proponent acknowledges that email transmissions are inherently unreliable. The Proponent is solely responsible for ensuring that its complete email proposal submission and all attachments have been received before Closing Time. If CIMMO’s Electronic Mail System rejects an email proposal submission for any reason, and the Proponent does not resubmit its proposal by the same or other permitted submission method before Closing Time, the Proponent will not be permitted to resubmit its proposal after Closing Time. The Proponent is strongly advised to contact the Government Contact

immediately to arrange for an alternative submission method if:

- (i) the Proponent’s email proposal submission is rejected by CIMMO’s Electronic Mail System; or
- (ii) the Proponent does not receive an automated response email from CIMMO confirming receipt of the email and all attachments within a half hour of the time the email proposal submission was sent by the Proponent.

An alternate submission method may be made available, at CIMMO’s discretion, commencing one half hour before the Closing Time, and it is the Proponent’s sole responsibility for ensuring that a complete proposal (and all attachments) submitted using an approved alternate submission method is received by CIMMO before the Closing Time. CIMMO makes no guarantee that an alternative submission method will be available or that the method available will ensure that a Proponent’s proposal is received before Closing Time.

2.4 Additional Information

All Addenda will be communicated by email. It is the sole responsibility of the Proponent to check for CIMMO’s addenda email. Proponents are strongly encouraged to check their junk email to ensure that they received the notices of Addenda.

2.5 Late Proposals

Proposals will be marked with their receipt time at the Closing Location. Only complete proposals received and marked before the Closing Time will be considered to have been received on time. Proposals received late will be marked late and not considered or evaluated. In case of a dispute, the proposal receipt time as recorded by CIMMO at the Closing Location will prevail whether accurate or not.

2.6 Proposal Validity

Proposals will be open for acceptance for at least 15 days after the Closing Time.

2.7 Firm Pricing

Prices will be firm for the entire Contract period unless the RFP specifically states otherwise.

2.8 Completeness of Proposal

By submitting a proposal, the Proponent warrants that, if the RFP is to design, create or provide a system or manage a program, all components required to run the system or manage the program have been identified in the proposal or will be provided by the Contractor at no additional charge.

2.9 Changes to Proposals

By submitting a clear and detailed written notice, the Proponent may amend or withdraw its proposal before the Closing Time. Unless the RFP otherwise provides, Proponents should use a consistent submission method for submitting proposals and any amendments or withdrawals. Upon Closing Time, all proposals become irrevocable. The Proponent will not change any part of its proposal after the Closing Time unless requested by the CIMMO for purposes of clarification.

2.10 Conflict of Interest/No Lobbying

- a) A Proponent may be disqualified if the Proponent's current or past corporate or other interests, or those of a proposed subcontractor, may, in CIMMO's opinion, give rise to an actual or potential conflict of interest in connection with the services described in the RFP. This includes, but is not limited to, involvement by a Proponent in the preparation of the RFP or a relationship with any employee, contractor, or representative of CIMMO involved in preparation of the RFP, participating on the evaluation committee or in the administration of the Contract. If a Proponent is in doubt as to whether there might be a conflict of interest, the Proponent should consult with the Government Contact prior to submitting a proposal. By submitting a proposal, the Proponent represents that it is not aware of any circumstances that would give rise to a conflict of interest that is actual or potential, in respect of the RFP.
- b) A Proponent must not attempt to influence the outcome of the RFP process by engaging in lobbying activities. Any attempt by the Proponent to communicate for this purpose directly or indirectly with any employee, contractor, or representative of CIMMO, including members of the evaluation committee and any elected officials of CIMMO, or with the media, may result in disqualification of the Proponent.

2.11 Subcontractors

- a) Unless the RFP states otherwise, CIMMO will accept proposals where more than one organization or individual is proposed to deliver the services described in the RFP, so long as the proposal identifies the lead entity that will be the Proponent and that will have sole responsibility to deliver the services under the Contract. CIMMO will enter a Contract with the Proponent only. The evaluation of the Proponent will include evaluation of the resources and experience of proposed subcontractors, if applicable.
- b) All subcontractors, including affiliates of the Proponent, should be clearly identified in the proposal.
- c) A Proponent may not subcontract to a firm or individual whose current or past corporate or other interests, may, in CIMMO's opinion, give rise to an actual or potential conflict of interest in connection with the services described in the RFP. This includes, but is not limited to, involvement by the firm or individual in the preparation of the RFP or a relationship with any employee, contractor, or representative of CIMMO involved in preparation of the RFP, participating on the evaluation committee or in the administration of the Contract. If a Proponent is in doubt as to whether a proposed subcontractor might be in a conflict of interest, the Proponent should consult with the Government Contact prior to submitting a proposal. By submitting a proposal, the Proponent represents that it is not aware of any circumstances that would give rise to a conflict of interest that is actual or potential, in respect of the RFP.
- d) Where applicable, the names of approved subcontractors listed in the proposal will be included in the Contract. No additional subcontractors will be added, nor other changes made to this list in the Contract without the written consent of CIMMO.

2.12 Evaluation

- a) Proposals will be assessed in accordance with the evaluation criteria. CIMMO will be under no obligation to receive further information, whether written or oral, from any Proponent. CIMMO is under no obligation to perform any investigations

or to otherwise verify any statements or representations made in a proposal.

- b) Proposals from not-for-profit agencies will be evaluated against the same criteria as those received from any other Proponents.
- c) Preference will be given to proponents based in Ontario.
- d) **CIMMO will not consider nor evaluate any proposals from other countries (only Canadian-based proponents will be considered).**

2.13 Contract

- e) By submitting a proposal, the Proponent agrees that should its proposal be successful the Proponent will enter a Contract with CIMMO on substantially the same terms and conditions set out in Appendix A and such other terms and conditions to be finalized to the satisfaction of CIMMO, if applicable.
- f) Written notice to a Proponent that it has been identified as the successful Proponent and the subsequent full execution of a written Contract will constitute a Contract for the goods or services, and no Proponent will acquire any legal or equitable rights or privileges relative to the goods or services until the occurrence of both such events.

2.14 Contract Finalization Delay

If a written Contract cannot be finalized with provisions satisfactory to CIMMO within thirty days of notification of the successful Proponent, CIMMO may, at its sole discretion at any time, thereafter, terminate discussions with that Proponent and either commence finalization of a Contract with the next qualified Proponent or choose to terminate the RFP process and not enter a Contract with any of the Proponents.

2.15 Debriefing

At the conclusion of the RFP process, all Proponents will be notified. Proponents may request a debriefing meeting with CIMMO.

2.16 Proponents' Expenses

Proponents are solely responsible for their own expenses in participating in the RFP process, including costs in preparing a proposal and for subsequent finalizations with CIMMO, if any. CIMMO will not be liable to any Proponent for any claims, whether for costs, expenses, damages, or losses incurred by the Proponent in preparing its proposal,

loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

2.17 Limitation of Damages

By submitting a proposal, the Proponent agrees that it will not claim damages, for whatever reason, relating to the Contract or in respect of the competitive process, more than an amount equivalent to the reasonable costs incurred by the Proponent in preparing its proposal and the Proponent, by submitting a proposal, waives any claim for loss of profits if no Contract is made with the Proponent.

2.18 Liability for Errors

While CIMMO has used considerable efforts to ensure information in the RFP is accurate, the information contained in the RFP is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by CIMMO, nor is it necessarily comprehensive or exhaustive. Nothing in the RFP is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in the RFP.

2.19 No Commitment to Award

The RFP should not be construed as an agreement to purchase goods or services. The lowest priced or any proposal will not necessarily be accepted. The RFP does not commit CIMMO in any way to award a Contract.

2.20 No Implied Approvals

Neither acceptance of a proposal nor execution of a Contract will constitute approval of any activity or development contemplated in any proposal that requires any approval, permit or license pursuant to any federal, provincial, regional district or municipal statute, regulation, or by-law.

2.21 Legal Entities

CIMMO reserves the right in its sole discretion to:

- a) disqualify a proposal if CIMMO's is not satisfied that the Proponent is clearly identified;
- b) prior to entering into a Contract with a Proponent, request that the Proponent provide confirmation of the Proponent's legal status (or in the case of a sole proprietorship, the Proponent's legal name and identification) and certification in a form satisfactory to CIMMO that the Proponent has the power and capacity to enter into the Contract;

- c) not to enter a Contract with a Proponent if the Proponent cannot satisfy CIMMO that it is the same legal entity that submitted the Proponent's proposal; and
- d) require security screenings for a Proponent who is natural person, subcontractors and key personnel before entering into a Contract and decline to enter into a Contract with a Proponent or to approve subcontractor or key personnel that fail to pass the security screenings to CIMMO's satisfaction.

2.22 Reservation of Rights

In addition to any other reservation of rights set out in the RFP, CIMMO reserves the right, in its sole discretion:

- a) to modify the terms of the RFP at any time prior to the Closing Time, including the right to cancel the RFP at any time prior to entering a Contract with a Proponent.
- b) in accordance with the terms of the RFP, to accept the proposal or proposals that it deems most advantageous to itself;
- c) to waive any non-material irregularity, defect or deficiency in a proposal;
- d) to request clarifications from a Proponent with respect to its proposal, including clarifications as to provisions in its proposal that are conditional or that may be inconsistent with the terms and conditions of the RFP, without any obligation to make such a request to all Proponents, and consider such clarifications in evaluating the proposal;
- e) to reject any proposal due to unsatisfactory references or unsatisfactory past performance under contracts with CIMMO, or any material error, omission or misrepresentation in the proposal;
- f) at any time, to reject any or all proposals; and
- g) at any time, to terminate the competition without award and obtain the goods and services described in the RFP by other means or do nothing.

2.23 Ownership of Proposals

All proposals and other records submitted to CIMMO in relation to the RFP become the property of CIMMO.

2.24 Copyright

This document is subject to copyright and may be used, reproduced, modified, and distributed to the extent

necessary for the Proponent to prepare and submit a proposal.

2.25 Confidentiality Agreement

The Proponent acknowledges that prior to the Closing Time it may be required to enter into a confidentiality agreement with CIMMO to obtain access to confidential materials relevant to preparing a proposal.

2.26 Alternative Solutions

If more than one approach to deliver the services described in the RFP are offered, Proponents should submit the alternative approach in a separate proposal.

2.27 Collection and Use of Personal Information

Proponents are solely responsible for familiarizing themselves, and ensuring that they comply, with the laws applicable to the collection and dissemination of information, including resumes and other personal information concerning employees and employees of any subcontractors. If the RFP requires Proponents to provide CIMMO with personal information of employees who have been included as resources in response to the RFP, Proponents will ensure that they have obtained written consent from each of those employees before forwarding such personal information to CIMMO. Such written consents should specify that the personal information may be forwarded to CIMMO for the purposes of responding to the RFP and used by CIMMO for the purposes set out in the RFP. CIMMO may, at any time, request the original consents or copies of the original consents from Proponents, and upon such request being made, Proponents will immediately supply such originals or copies to CIMMO.

2.29 Tax Verification Letter

- a) As a condition of Contract finalization as described in Section 2.14, the successful Proponent (or any successor to that Proponent) will be required to provide the Ministry with a valid Tax Verification Letter, unless an exception applies as described below. If a Proponent is not able to produce the required Tax Verification Letter during Contract finalization, then CIMMO will be entitled to terminate discussions with that Proponent and proceed as described in Section 2.14.
- b) A Tax Verification Letter will not be required if:
- (i) the Contract is valued at *less than* CAN\$100,000, including all fees, expenses, and all options to extend or renew the Contract; or
- c) If a Tax Verification Letter is required, the Contract will contain, in addition to all other applicable schedules, a schedule that describes the Tax Verification Letter requirements of the Contract.

3.0 Third Party Technology

The Proponent is required to disclose a list of all Technology in the Proponent's business for which the Proponent does not own all rights, title and interest (collectively, the "Third Party Technologies"), and all license agreements or other contracts pursuant to which the Proponent has the right to use (in the manner used by the Proponent, or intended or necessary for use with the Proponent Technology) the Third Party Technologies (the "Third Party Licenses"), indicating, with respect to each of the Third Party Technologies listed therein, the owner thereof and the Third Party License applicable thereto. Except as disclosed in Schedule 2.14.3 to the Disclosure Memorandum, the Proponent has the right to use, free of any material restriction,

- a) all Third-Party Technology that is incorporated in or used in the development or production of the Proponent's Technology and
- b) all other Third-Party Technology necessary for the conduct of the Proponent's business as now conducted and as proposed to be conducted.

All Third Party Licenses are valid, binding and in full force and effect; the Proponent and, to the knowledge of the Proponent or any Shareholder, each other party thereto has performed in all material respects his, her or its obligations thereunder; and neither the Proponent nor, to the knowledge of the Proponent or any Shareholder, any other party thereto is in default thereunder, nor to knowledge of the Proponent or any Shareholder has there occurred any event or circumstance that with notice or lapse of time or both would constitute a default or event of default on the part of the Proponent or, to the knowledge of the Proponent or any Shareholder, any other party thereto or give to any other party thereto the right to terminate or modify any Third Party License. The Proponent has not received notice that any party to any Third-Party License intends to cancel, terminate, or refuse to renew such Third-Party License or to exercise or decline to exercise any option or right thereunder.

3.1 Access Proponent Technology

The proponent will be using CIMMO's proprietary or licenced CRM software and will agree that all information generated, received, or stored through the application is of CIMMO property and therefore is under a non-disclosure agreement between the proponent and CIMMO.

3.1.1 The proponent agrees to pay CIMMO for the licenses to be used in excess by their employees to fulfil any of the contacted KPI's or activities.

3 SITUATION/OVERVIEW

3.1 CIMMO Responsibility

CIMMO's sales & marketing team will be responsible for the smooth running of the contract.

3.2 Background

Currently the tasks are being run by various volunteer teams within CIMMO. To ensure better efficiency and increased growth, CIMMO has decided to partner with an external company to ensure that targets and goals are achieved.

The transition from the volunteer group will be smooth and will be monitored and enabled by the CIMMO executive management team.

3.3 Scope

The scope is clearly defined in "Section 1 – Summary of the opportunity". The scope will be delivered over multiple digital formats.

Measurable KPIs:

- CEM - <https://www.cimmo.org/cem/>
 - o Have 50% of Young Professionals (from the Membership targets below) attain the designation.
- CPM - <https://www.cimmo.org/cpm/>
 - o Have 50% of Academic members (from the Membership targets below) attain the designation.
 - o Have 75% of Professional members (from the Membership targets below) attain the designation.
- Membership targets <https://www.cimmo.org/membership/>
 - o Young Professional – Minimum 275 members per year, reviewed on a yearly basis.
 - o Academic – Minimum 100 members per year, reviewed on a yearly basis.
 - o Professional – Minimum 250 members year, reviewed on a yearly basis.
- Accreditation - <https://www.cimmo.org/dmc-2/>
 - o Identify and build the base for CIMMO to pursue
 - 1 Higher Education Institution in Ontario,
 - 1 Higher Education Institution in Canada, and
 - 1 International Higher Education Institutionto have CIMMO's marketing program accredited.
(International accreditations to be coordinated with our International Office)
- Onboard 2 institutional partners every year (Years 1 through 3)
- Current Web page and Blog page to be modified and maintained (a complete overhaul would be an option as well).
- Social media channels posts to be maintained
 - o LinkedIn – Page to be optimized, 3 posts a week
 - o Instagram – 4 posts a week
 - o Replying to comments mentioning CIMMO, commenting on trending posts in our market, re-sharing relevant content.

- Using CIMMO's CRM, monthly newsletters to be sent out to all members (CASL to be maintained), relevant e-blasts to students and professionals to be curated and sent on a regular basis (minimum of 2 e-blasts a month to each segment).
- PR activities to be coordinated and recommended to the CIMMO management team on a quarterly basis.
- Ensuring the broader CIMMO executive team is communicating CIMMO properly on their social media channels, replying to direct messages, etc.

4 CONTRACT

4.1 Contract Terms and Conditions

Proponents should carefully review the terms and conditions set out in Appendix A, including the Schedules.

4.2 Service Requirements

The Contractor's responsibilities will include the following:

- a) Detailed Quarterly Reports submitted digitally.
- b) Weekly attendance in meetings as required by CIMMO's management team.

4.3 Related Documents

A nondisclosure agreement (NDA) with CIMMO will have to be signed.

5 REQUIREMENTS

For a proposal to be considered, a Proponent must clearly demonstrate that they meet the mandatory requirements set out in Section 7.1 (Mandatory Criteria) of the RFP.

This section includes "Response Guidelines" which are intended to assist Proponents in the development of their proposals in respect of the weighted criteria set out in Section 7.2 of the RFP. The Response Guidelines are not intended to be comprehensive. Proponents should use their own judgement in determining what information to provide to demonstrate that the Proponent meets or exceeds CIMMO's expectations.

Please address each of the following items in your proposal in the order presented. Proponents may find it helpful to use the individual Response Guidelines as headings for proposal responses.

5.1 Capabilities

5.1.1 RELEVANT EXPERIENCE

The Proponent and any subcontractors of the Proponent included in its proposal should have a minimum of 1 year within the past 2 years of providing services of a similar scope and complexity.

Similar scope and complexity is defined as

- a) Well versed with all digital social media channels
- b) Experienced with digital marketing & advertising
- c) Web design & development experience
- d) Experience in developing and maintaining CRM software
- e) Experience with Non-Profit organizations will be an added benefit

5.1.2 REFERENCES

Proponents should provide a minimum of 2 (two) references (i.e., names and contact information) of individuals who can verify the quality of work provided specific to the relevant experience of the Proponent and of any subcontractors named in the proposal. References from the Proponent's own organization or from named subcontractors are not acceptable.

CIMMO may in its sole discretion, but is under no obligation to, check Proponent and subcontractor references without first notifying the Proponent or its subcontractors. CIMMO reserves the right to seek additional references independent of those supplied by the Proponent, including internal references in relation to the Proponent's and any subcontractor's performance under any past or current contracts with CIMMO or other verifications as are deemed necessary by it to verify the information contained in the proposal and to confirm the suitability of the Proponent.

Further to CIMMO's reservation of rights under Section 2.22, if the Proponent is deemed unsuitable by the CIMMO in its sole discretion due to unsatisfactory references, or if the proposal is found to contain material errors, omissions or misrepresentations, the Proponent's proposal may be rejected.

Response Guidelines for Capabilities

1. Name a contact person for the Proponent, and include this person's address, phone and fax numbers, and email address. This information will not be evaluated but will be used to contact the Proponent as required.
2. The contact person should preferably be the one who will be the key point of contact for all negotiations and be part of the implementation team
3. Provide a minimum of 2 (two) references specific to the experience cited, each of which includes a contact name, phone number and email address.
4. Describe how the Proponent will meet the environmental requirements set out in Section 5.1.3. All communication will be done over digital platforms.

5.2 Approach

5.2.1 SERVICE DELIVERY

All service to be delivered digitally and over the phone. If required face to face meetings can be arranged.

5.2.2 SERVICE TRANSITION

A smooth transition from CIMMO's volunteer team will be led by CIMMO's executive team.

5.3 Price

Prices quoted will be deemed to be:

- a) Shared revenue in Canadian dollars;
- b) inclusive of duty, FOB destination, and delivery charges where applicable; and
- c) exclusive of any applicable taxes.

Response Guidelines for Price

Proponent is free to open a discussion related to revenue share models.

5.4 Technology

Prices quoted will be deemed to be:

- d) Shared revenue in Canadian dollars;
- e) inclusive of duty, FOB destination, and delivery charges where applicable; and
- f) exclusive of any applicable taxes.

Response Guidelines for Price

Proponent is free to open a discussion related to revenue share models

6 PROPOSAL FORMAT

Proponents should ensure that they fully respond to all requirements in the RFP to receive full consideration during evaluation.

The following format, sequence, and instructions should be followed to provide consistency in Proponent response and ensure each proposal receives full consideration. All pages should be consecutively numbered.

- a) Signed cover page (see section 7.1 Mandatory Criteria).
- b) Table of contents including page numbers.
- c) A short (one or two page) summary of the key features of the proposal.
- d) The body of the proposal, including pricing, i.e., the “Proponent Response”.
- e) Appendices, appropriately tabbed and referenced.
- f) Identification of Proponent (legal name)
- g) Identification of Proponent contact (if different from the authorized representative) and contact information.

7 EVALUATION

Evaluation of proposals will be by a committee formed by CIMMO and may include employees and contractors of CIMMO and other appropriate participants. Evaluators will be required to sign confidentiality acknowledgments or agreements and provide conflict declarations as a condition of participation on an evaluation committee.

The CIMMO’s intent is to enter a Contract with the Proponent who has met all mandatory criteria and minimum scores (if any) and who has the highest overall ranking.

Proposals will be assessed in accordance with the entire requirement of the RFP, including mandatory and weighted criteria.

7.1 Mandatory Criteria

Proposals not clearly demonstrating that they meet the following mandatory criteria will be excluded from further consideration during the evaluation process.

Mandatory Criteria
The proposal must be received at the Closing Location before the Closing Time.
The proposal must be in English.
The proposal must be submitted using one of the submission methods set out on the cover page of the RFP and in accordance with Section 2.3.
The proposal must include a copy of the cover page that is signed by an authorized representative of the Proponent that confirms the Proponent's intent to be bound, in accordance with the requirements set out in Section 2.2.
The proponent's entity must be incorporated in Canada and have at least 50% of its work force based in Canada.

7.2 Price Evaluation

Price evaluations will be based on the lowest price that meets the requirements as per the KPIs as per Section 3.3 Scope.

Appendix A - Contract Form

By submitting a proposal, the Proponent agrees that should its proposal be successful, the Proponent will enter into a Contract with CIMMO on substantially the same terms and conditions of the following, and such other terms and conditions to be finalized to the satisfaction of the CIMMO:

- Information Technology and Management Consulting Professional Services Agreement

The following schedules will be included in the Contract:

- Schedule A (Services)
- Schedule B (Fees)
- Schedule C (Subcontractors, if applicable)
- Schedule D (Including Insurance if required)
- Schedule E (Privacy)
- Schedule F (Additional Terms)
- Schedule G (Security)
- Schedule H (Tax Verification)