# REQUEST FOR PROPOSAL

FROM <SPORT ORGANIZATION> AND ITS PROVINCIAL SECTION ORGANIZATIONS

for a

**Canadian <Sport> Registration System (“CXRS”)**

<Sport Organization> (NSO) and its Provincial Section Organizations are requesting Proposals from responsible Vendors to meet the <Sport> community’s needs for a common online registration system. Below is a brief description of our needs with detailed requirements in subsequent sections of this solicitation. If you are interested and able to meet these requirements, please submit a Proposal.

**Brief Description:**

*{this section should be tailored to provide an overview of the sport, its organization, objectives etc}*

<Sport> in Canada is organized with a unique National Sport Office (NSO) and a unique Provincial Section Organization (PSO) for each province/territory. Both the NSO and each PSO organize and offer various types of <Sport> events for <Sport> participants in Canada. These can be competitions such as race meets, training opportunities for athletes such as camps or clinics, or leadership development events for coaches, officials or administrators. Generally speaking, the <Sport> season runs from <start month> through <end month>.

It is the current policy of the NSO and PSOs that registrants must be members of the PSO of their residence. Members may be members of a Club or they can be unattached. Membership fees vary according to the participant’s role. Membership is designated over a 12 month period from <start month> through <end month>. Note that individual membership is purchased at the PSO level only and that entitles the member to be part of the NSO as well. It should be noted that the CXRS is intended to be capable of providing event registration services to any Canadian in every PSO, however, the system must also allow for the possibility that a PSO may have a distinct system (manual or automated) for undertaking their own membership and event registration. As the CXRS must be accessible to all Canadians, it must support both official languages.

The Canadian <Sport> Registration System (CXRS) is intended to meet the following objectives:

* Allow <Sport> participants in Canada to register for activities offered by the NSO and their PSO, including the collection of fees for those events;
* Allow <Sport> participants to register with their Club, PSO and NSO.
* Allow the NSO and PSOs to maintain up-to-date information on <Sport> participants so they are able to provide both quality and efficient services in both defining and delivering their events.
* Ensure a quality customer experience in registering for events while allowing the NSO and PSOs to have visibility and control of the customer relationship.

Note that while it is primarily intended that the CXRS will provide the capability for the NSO and PSOs to offer registration services, we wish to be able to also offer this capability in the CXRS to Clubs or other <Sport> Event Organizers. In this case, the PSO’s would be able to establish such associations as Event Organizers in the CXRS under their jurisdiction. Such associations would only have visibility into their own participants and their own events, and they should be able to set fees and accept payment for their events/services and communicate/collaborate with members/registrants.

<Sport Organization> is the corporate entity that is undertaking this proposal process.

The solicitation package consists of the following sections:

**Part A INSTRUCTIONS FOR SUBMITTING AND EVALUATING BIDS AND PROPOSALS:** Part A consists of the following sections:

SECTION 1 INSTRUCTIONS, DATES, RESERVATIONS AND OTHER GENERAL INFORMATION

SECTION 2 HOW WE WILL EVALUATE PROPOSALS

SECTION 3 SPECIFICATIONS / QUALIFICATIONS / STATEMENT OF WORK

These sections provide information necessary for submitting a proposal, set forth the basic legal and policy requirements associated with this solicitation and tell how we will evaluate proposals.

**Part B PROPOSAL RESPONSE FORMS:** Part B consists of the following sections:

SECTION 4 PROPOSAL TO <SPORT ORGANIZATION>

SECTION 5 RESPONSIBILITY FORMS

SECTION 6 RESPONSIVENESS

SECTION 7 PRICE

SECTION 8 CONTRACT

Your response to Part B will constitute your Proposal and will provide us with information about you, what you will provide, your ability to perform and your price. We will evaluate this information as well as compliance with the Instructions.

**SECTION 1 - INSTRUCTIONS, DATES, RESERVATIONS AND OTHER GENERAL INSOORMATION**

**1.1 PROJECT CONTACT:** If you have a question or suspect an error, you must immediately notify the Project Contact identified in this section. Do not discuss the solicitation or your Proposal, directly or indirectly, with any NSO or PSO officer or employee other than the Project Contact. Only written answers to questions shall be binding on the NSO.

<name>, Project Coordinator Phone: <>

E-mail: <email>

**1.2 Proposal Due Date, time and Submission location:** **Due Date: <…> Time: <…>**

NSO requests that Proposals are provided in electronic format only (PDF format).

**DELIVER PROPOSALS TO**:

NSO

<…>, Project Coordinator Phone: <…>

E-mail: <…>

We will open Proposals at the Due Date. Prior to the due date, you may email Proposals, modifications, and withdrawals. We will not consider Proposals, modifications or withdrawals submitted after the due date and time. All times are in Eastern Standard times.

**1.3 QUESTIONS/ANSWERS:** You can ask questions regarding the RFP only in writing by submitting an email to the Project Coordinator. Answers will be provided in writing to all potential respondents. Potential respondents must confirm their interest to receive responses to questions by providing their email contact address by <…>.

Deadline for submission of Written Questions <…>

Latest response to Questions: <…>

**1.4 TIMELINES:** Following are the timelines relating to the RFP process:

Issue RFP <…>

**PROPOSALS DUE** <…>

Selected vendor presentations <…>

Evaluation End <…>

Notification of Successful Bidder <…>

Contract Execution <…>

**1.5 PROPOSAL FIRM TIME:** Your Proposal must remain firm for \_\_120\_\_\_\_ days from opening.

**1.6 VENDOR PRESENTATIONS:** Selected Vendors will be invited to make a presentation of their proposed solution and respond to questions on their proposals. Presentations are scheduled for <dates> in <location>. Vendors will have the option of attending in person or may provide an online presentation.

**1.7 AWARD:** We will send notification that a preferred Proposal has been determined. The notice extends the Proposal Firm Time until the parties sign a contract or determine not to sign a contract. We may accept or reject your Proposal as submitted, or may require contract negotiations. If negotiations do not result in an acceptable agreement, we may reject your Proposal and begin negotiations with another Vendor.

**1.8 RESERVATIONS:** You must read and understand the solicitation and tailor your Proposal and activities to ensure compliance. We reserve the right to amend the solicitation; reject any or all Proposals; to award by item, group of items, or grand total; and to waive minor defects. We may request a clarification; inspect your premises; interview staff; request a presentation; or otherwise verify the contents of the Proposal, including information about subcontractors and suppliers. We may request Best & Final Proposals when appropriate. We will make all decisions on compliance, evaluation, terms and conditions, and shall make decisions solely in the best interests of the NSO. This competitive process requires that you provide additional information and otherwise cooperate with us. If you do not comply with requests for information and cooperate, we may reject your Proposal. You have no right to an award by submitting a Proposal, nor do you have the right to a contract even if you are designated as the preferred proposal. We are not responsible for and will not pay any costs associated with the preparation and submission of your proposal in any manner whatsoever. If you are the awardee, you shall not commence, and will not be paid for any work prior to the date all parties execute a contract.

**1.9 GOVERNING LAW AND FORUM:** The laws of <*Ontario?*> will govern.

**SECTION 2 - HOW WE WILL EVALUATE PROPOSALS**

**2.1 PROPOSAL RESPONSE FORMS:** We will evaluate the information you provide in your proposal response forms. You will find these forms in later sections of this solicitation.

**2.2 EVALUATION CATEGORIES:** We evaluate four categories of information: Administrative Compliance, Responsibility, Responsiveness, and Price. We will consider the information you supply or don’t supply, and the quality of that information when evaluating your Proposal. If we find a failure or deficiency, we may have to reject the Proposal or reflect that in the evaluation.

 2.2.1 ADMINISTRATIVE COMPLIANCE: We will determine whether your Proposal complied with the Instructions for submitting Proposals. Except for late submissions, we may require that a Vendor correct deficiencies as a condition of further evaluation.

 Due to the timelines and level of responsibility that we are looking to the successful bidder to provide, this procurement requires bidders to have significant experience in the area of event registration for sporting organizations. The Vendor must provide a sufficient explanation to show compliance with this requirement. See Section 3.5.1 for further details.

 2.2.2 RESPONSIBILITY: We will determine whether you are a “Responsible” Vendor; a Vendor with whom we can or should do business.

1. A “Responsible” Vendor must exist as a legal entity and must be authorized to do business in Canada prior to entering into any contract with NSO. Vendor must provide evidence of their authorization to conduct business in Canada before entering into any contract for the system.
2. Other factors that we may evaluate to determine Responsibility include, but are not limited to: certifications, financial disclosures, business identification information, past performance, references (including those found outside the Proposal,) compliance with applicable laws, financial stability, adherence to standards, and the perceived ability to perform completely as specified.

 Vendors must show financial resources and stability sufficient to sustain services for the length of the contract. To facilitate our review, Vendors must submit the company’s annual financial statements for the past three (3) years. If there is a reasonable doubt that the Vendor can provide services for the length of the contract, we may require that a Vendor correct any deficiencies as a condition of further evaluation, or a failing score may be given. This category will be scored as either a pass or fail.

 2.2.3 RESPONSIVENESS: We will determine whether the Proposal meets the stated requirements. Minor differences or deviations that have negligible impact on the price or suitability of the supply or service to meet NSO’s needs may be accepted or corrections allowed. If no administratively compliant and responsible Vendor meets a particular requirement, we may waive that requirement. Vendors are further encouraged to demonstrate responsiveness by showing innovative approaches to our needs.

 2.2.4 PRICE: We will identify the lowest priced Proposal that meets Administrative, Responsibility and Responsiveness requirements. We will rank Proposals in order of Price when appropriate but we will not bind ourselves to accept the lowest price submitted.

**2.3 AWARD:** We will award to the Responsible Vendor whose Proposal passes Administrative review, is Responsive, and who submits the best value as shown by the combination of Responsiveness and Price.

We will determine how well Proposals meet the Responsiveness requirements. We will rank Proposals, without consideration of Price, from best to least qualified using a point ranking system (unless otherwise specified) as an aid in conducting the evaluation. Vendors who receive fewer than the minimum required points will not be considered for Price evaluation and award. Vendors must receive at least 100 points to be considered for price evaluation.

If we do not consider the Price to be fair and reasonable and we cannot negotiate to an acceptable Price, we reserve the right to cancel the award and take appropriate action to meet our needs. We will determine whether the price is fair and reasonable by considering the Proposal, including the Vendor's qualifications, the Vendor's reputation, all prices submitted, other known prices, the project budget and other relevant factors.

The point evaluation system is described below.

*{NOTE: the evaluation system and weightings should be tailored to the NSO’s objectives}*

|  |  |
| --- | --- |
| **Executive Summary*** **Knowledge of and experience with Registration and Membership for Sporting Organizations**
* **Innovation and distinction in your offerings**
* **Commitment to highest level of quality control and service**
* **Willingness to work with the partners of NSO**
 | **20** |
| **Technical Approach*** **Content**
* **Adaptability/Innovation**
 | **100** |
| **Firm’s Experience & Resources** * **Experience and knowledge in developing and maintaining systems of this type**
* **Ability to complete the project in specified timeframe**
* **Commitment and ability to deliver contract requirements for the length of the contract**
 | **30**  |
| **Project Management Approach*** **Section 3 response, including in particular the strategy and implementation plan, indicates sound grasp of project scope and ability to manage all elements**
* **Project manager has appropriate level of experience given scope and timing of our project**
 | **20** |
| **References*** **Score will be determined by the responses and ratings given by companies responding to our Reference Questions**
 | **30**  |

 2.3.1 The chart below shows the elements of Responsiveness that we will evaluate, their relative weights in point format and any minimum point requirements. The total number of points for Responsiveness is \_\_200\_\_\_\_\_.

 2.3.2 The total number of points for Price is \_\_50\_\_\_\_\_. We will determine Price points using the following formula:

 Maximum Price Points X (Lowest Price/Offeror’s Price) = Total Price Points

 2.3.3 The maximum number of points is \_\_\_\_250\_\_\_ (Responsiveness \_\_\_\_200\_\_\_ + Price\_\_\_\_50\_\_\_).

**SECTION 3 - SPECIFICATIONS / QUALIFICATIONS / STATEMENT OF WORK**

**3.1 NSO’S NEED FOR SUPPLIES / SERVICES**

**3.1.1 General Overview**

*{this section should be tailored…}*

NSO and its PSO’s have been utilizing a variety of Registration Systems from a variety of vendors. We wish to offer the opportunity for vendors to propose a single solution to meet the requirements for <Sport> across Canada.

Over the past season, our various registration systems have maintained individual records for over <# users> users and about <# clubs> Clubs and processed approximately $xx,000,000 in approximately xxx,000 transactions. It is anticipated that the CXRS could be utilized by all PSO’s and would need to accommodate at least xx,000 registrants in its first year and over $xx,000,000 in total transaction value. It is anticipated that the number of registrants will grow over the course of the term of the anticipated agreement.

NSO wants to open the solicitation for a new Registration System based on a software-as-a-service (“SAAS”) business model to vendors with a proven track record of providing these types of systems to the sporting community. NSO anticipates entering into a five (5) agreement with the Successful Bidder to provide the CXRS, with five (5) one (1) year options for renewal terms. It is anticipated that the CXRS implementation will commence on <…>with the system going-live on <…>.

**3.1.2 Objectives**

The <Sport> Registration System (CXRS) is intended to meet the following objectives:

* Allow <Sport> participants in Canada to register for events offered by the NSO and their PSO, including the collection of fees for those events;
* Allow <Sport> participants to sign up for membership with their PSO and NSO.
* Allow the NSO and PSOs to maintain up-to-date information on <Sport> participants so they are able to provide both quality and efficient services in both defining and delivering their events.
* Ensure a quality customer experience in registering for events while allowing the NSO and PSOs to have visibility and control of the customer relationship.

**3.1.3** **Overview of Software Requirements**

The system software requirements are described in the attached document “Canadian <Sport> Registration System - Statement of Requirements Vx.x”.

**3.1.4 Overview of Hardware Requirements**

The Vendor must provide, maintain and operate all hardware necessary to meet the requirements of the CXRS. Consistent with the SAAS business model, NSO does not wish to take any ownership nor responsibility for any hardware elements for the system. The Vendor must take responsibility for ensuring that the hardware environment for the CXRS meets the functional, performance, availability and security requirements of the CXRS.

**3.1.5 Overview of Service Requirements**

The Vendor must provide implementation, configuration, testing, training, support and maintenance services for the duration of the contract.

The Vendor must provide services to develop, configure, and test their system to meet the requirements of the CXRS. They must provide services to convert existing data from existing registration systems and initiate the CXRS with this data. The Vendor must also provide training services such that the NSO and PTA system administrators are able to operate the system prior to the go-live date.

The vendor must provide all levels of support and maintenance of the system including Level 1 support to systems users through a toll-free hotline plus online support. Such Level 1 support must be provided from 8am – 11pm Eastern Time, 7 days per week.

On-call programming support by the Vendor is required to handle any critical condition that arises which jeopardizes the integrity of our data and services, 24 hours a day, and 7 days per week.

Software upgrades and updates developed by the Vendor during the term of the Agreement must also be made available to NSO, and NSO must be notified of all future upgrades and modifications to the application.

**3.1.6 Implementation Overview**

As noted, NSO anticipates entering into a five (5) agreement with the Successful Bidder to provide the CXRS. It is anticipated that the CXRS implementation will commence on <…>with the system going-live on <…>.

Over the period from <…>through <…>the Vendor must provide services to develop, configure and test their system to meet the requirements of the CXRS. They must provide services to convert existing data from the current NRS system and initiate the CXRS with this data. The Vendor must also provide training services such that the NSO and PSO system administrators are able to operate the system prior to the go-live date.

**3.1.7 System Sizing Assumptions**

The following sizing assumptions are based on current and projected sizing parameters for NSO and the PSO utilization only. Vendors should utilize the following assumptions regarding the sizing of the system as the minimal sizing parameters for the purposes of this project:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **2014-2015** | **2015-2016** | **2016-2017** | **2017-2018** | **2018-12019** |
| No. of Unique Registrants | **<…>** | **<…>** | **<…>** | **<…>** | **<…>** |
| Gross Transaction Value | **<…>** | **<…>** | **<…>** | **<…>** | **<…>** |
| No. of Transactions | **<…>** | **<…>** | **<…>** | **<…>** | **<…>** |

**3.2 SUPPLIES AND/OR SERVICES REQUIRED**

**3.2.1**  **Training, Services, and Security Plan**

The Vendor is required to provide NSO with technical support services as described below.

**3.2.1.1** **NSO Staff Training**

NSO personnel will be responsible for the administration of the CXRS. Therefore, the Vendor shall train NSO personnel on the use and operation of the System.

The Vendor must provide training for NSO staff, at NSO offices or appropriate venues, or both, as approved by NSO. We estimate that on-site or online training will be required for up to 15 people prior to CXRS implementation.

Besides the initial training for NSO personnel prior to the time of conversion, follow-up training must be provided when changes are made to the CXRS for any new software. We anticipate that most follow-up training can be web-based, as opposed to on-site; however, we reserve the right to require on-site training for major changes or upgrades.

The Vendor must provide all procedure/help manuals (in electronic form) before System start-up and provide follow-up training and updated manuals when any change is made. Training must be customized to meet the unique needs of NSO employees performing their primary roles as Administrators for their organizations. At times during the Contract term, additional training may be needed as System features evolve.

**3.2.1.2 Technical Support Services**

The Vendor shall provide on-call system technical support services twenty-four (24) hours a day, seven (7) days a week, 365 days a year. The experienced team member who is on call must be able to respond (return the phone call and start troubleshooting the issue) within 15 minutes. The availability and reliability of the CXRS is extremely crucial, so the Vendor must also describe its escalation procedure in the event that on-call personnel are unable to troubleshoot the problem within 30 minutes, or if the identified problem cannot be resolved within 60 minutes, after NSO’s call.

Timely and committed fulfillment of NSO requests for System technical support and changes is required. The Vendor’s proposal must identify how systems and software engineering support services for System administration, System error correction, changes to NSO’s business rules, and changes to administrative reporting requirements will be delivered in relation to the following:

1. **Application Software Support.** The Vendor must provide support for development, changes, testing, and installation of CXRS application software as well as systems engineering support for System administration, corrections, updates, and enhancements to environmental software. Good configuration management practices are vital.

**3.2.1.3 System Change Control and Configuration Management**

The Vendor shall operate under well-defined change control and configuration management practices, as described below, which shall apply to all of the following components**:** documentation, procedures, specifications, program application source and object code, operating systems, database platforms, other third-party applications, host systems, and any other major System components.

1. The Vendor shall ensure through procedural and System controls that only NSO-approved changes, on an approved schedule, can be made. Reports and displays shall be available to NSO to review all related change and configuration management activities.

2. All changes to applications must first be completed and tested in the Vendor’s Quality Assurance environment.

**3.2.1.4 System Security**

NSO expects its System and operations to be of the highest security and integrity. This requires both NSO and its Vendor to maintain a confidential, highly secure System. For example, the System must have controls that mitigate such threats as identity theft and unauthorized personal information access.

The Vendor shall include a summary of their security plan with their proposal and present a complete security plan ready for approval by NSO before start-up. The Vendor must update the security plan as needed, and must cooperate with NSO in demonstrating the effectiveness of the plan if requested.

**3.2.2 Implementation Plan**

**3.2.2.1 Conversion Project Strategy**

The Vendor’s proposal must include a high level conversion strategy that would best support NSO’s implementation, including milestones that will need to be reached by each of the parties expected to be involved in the implementation. The project strategy must also include a description of quality assurance measures that will be taken and how start-up failures due to CXRS problems will be avoided.

**3.2.2.2 Implementation Plan**

Vendor must submit an implementation plan and time chart (Gantt, PERT, or similar) identifying the major milestones to be accomplished, and when, for the business requirements definition, software programming, system set-up, testing, training, and data conversion. The plan must make clear which items are on the critical path for timely implementation including tasks for each of the four teams in the process. The final implementation plan of the Vendor requires NSO approval.

**3.2.2.3 NSO Quality Assurance**

The NSO will conduct a series of customer acceptance tests. NSO customer acceptance testing will be conducted from NSO Headquarters or other location as may be defined by NSO. The Vendor shall support these efforts as needed.

1. Schedule for NSO Quality Assurance. To support customer acceptance testing, the Vendor must have the CXRS systems and software configured and operational by <…>.
2. Documentation and Support. Training and operations manuals and documentation specific to the CXRS must be delivered to NSO prior to the readiness of the System for NSO CAT. During critical parts of the CAT testing period, as determined by NSO, the Vendor must provide technical staff as a resource to collaborate and support NSO’s customer acceptance testing.
3. Release Notes. Each release of the software for testing by NSO must be accompanied by release notes. The release notes must evidence good configuration management practices, namely each release must be identified by a version number and the changes must be succinctly defined. This requirement shall extend throughout the Contract.
4. Entry and Exit Criteria. NSO will consider the System ready for CAT testing once the system is configured to operate according to NSO’s specifications and in accordance with NSO’s standards, including security standards. It will be necessary for QA testing to be completed by the Vendor prior to submitting software for testing. We expect that quality data as well as data that will simulate errors will be used for testing. The Vendor must have the CXRS ready for CAT testing no later than <…>. NSO will have successfully completed its customer acceptance testing when all components of the CXRS have been tested and all significant issues identified and resolved.
5. Vendor shall conduct internal QA testing on its proposed system prior to provision of the System to NSO for NSO CAT testing. When Vendor delivers the proposed system to NSO for CAT testing, Vendor shall include copies of all test plans and test results associated with Vendor’s internal QA testing.

**3.2.2.4 Project Reporting and Monitoring**

The Vendor will need to provide a technical project manager for the CXRS implementation and testing. Regular reporting (weekly status reports), walkthroughs, and project status meetings are required.

The Vendor shall provide suitable access to project records to enable NSO staff to monitor project management tasks, schedules, and issues. This requirement begins with Conversion and continues throughout the Contract.

**3.2.2.5** **Historical Data**

The Vendor should convert all pre-existing NRS participant information so that NSO will see a continuity of data and reports from before, during, and after the System start-up day.

**3.2.2.6 Payment Processor**

The Vendor shall describe which Payment Processor he would propose to include as part of his proposed system, and provide justification for his choice. The Vendor should preferably have experience in working with the proposed Payment Processor.

**3.3 MILESTONES AND DELIVERABLES**

The following are tentative milestone dates for this procurement. The NSO reserves the right to modify these dates as needed to maintain an open and competitive procurement environment and ensure delivery of a quality product. We recognize that the product delivery timeframe is ambitious and will consider the impact on stated delivery dates prior to making any schedule changes.

Issue RFP <…>

Last Chance for Written Questions <…>

Written Answers back <…>

**PROPOSALS DUE** <…>

Selected Vendor Presentations <…>

Evaluation End <…>

Notification of Successful Bidder <…>

Contract Execution <…>

Implementation <…>

CAT testing Start <…>

Final testing and Conversion <…>

CXRS Go-live <…>

**3.4 REPORTING, STATUS AND MONITORING**

 3.4.1 At NSO’s option the Parties will work together to monitor performance during the contract and any warranty term. This may include use of a performance scorecard with conditions, milestones, requirements, or timetables that must be met before additional steps may be taken, or payment is due. The scorecard may also record matters related to price, service, quality and other factors deemed important.

 3.4.2 Vendor shall cooperate with NSO in this monitoring activity, which may require that Vendor report progress and problems (with proposed resolutions), provide records of its performance, allow random inspections of its facilities, participate in scheduled meetings and provide management reports as requested by NSO.

**3.5 VENDOR QUALIFICATIONS**

 **3.5.1 Vendor Qualifications and Experience**

 Vendor must have been a legal business entity for at least three (3) years prior to the issue date of this RFP in order to meet the minimum experience requirements for this contract (please indicate number of years in business and state of incorporation/registration). Vendor must also be able to demonstrate the successful development, implementation and ongoing support of at least three (3) Event Registration Systems for sporting organizations, preferably of a comparable size and/or complexity of our proposed system.

 For each prior project described in your response to this Section, please indicate the delivery timeframe for the Registration System, from contract execution through implementation, and the size of the team utilized for the project. Additionally, please illustrate how your firm was able to respond to the client’s changing needs over the course of the contract to keep pace with new event types and rules, technologies, etc. We require a CXRS partner that can help us innovate and grow.

 **3.5.2** **Software Development and Support Capabilities**

Capacity to provide the CXRS software and technical support is critical to the System.

1. **Software Development Plans.** The Vendor shall describe its staff skill levels, headcounts, and locations pertinent to developing and maintaining software for NSO Contract.
2. **Software Quality**. The Vendor shall address software engineering quality practices, and in particular whether the Proposer is certified under recognized quality practice standards.

**3.5.3 Project Management Capabilities**

Capacity to conduct the implementation and to plan and execute additional evolutionary CXRS changes is critical to the project.

1. **Project Management Approach.** The Vendor shall describe its corporate organization and tools pertinent to managing a large project similar to the System and Services contemplated under the Contract. Vendor must identify a Project Manager for the implementation and testing phases of the project.
2. **Project Management Quality.** The Vendor shall address project management quality practices. Examples of similar project management experience of the Project Manager for similar projects should be provided.

**3.5.4 Security Management Capabilities**

The Vendor must demonstrate a capacity to develop and implement a comprehensive plan for maintaining effective security controls and practices. This is critical to ensuring the integrity of NSO operations.

1. **Security Management Approach.** The Vendor shall describe its corporate organization and tools pertinent to managing all aspects of information security pertaining to an event registration system.
2. **Security Standards.** The Vendor must address security standards and practices, particularly in relation to the protection of personal information as well as online payment processing.

 **3.5.5 References.**  You must provide references from entities for which you have implemented and maintained a registration system for a sporting organization (minimum of three) that can attest to your experience and ability to perform the contract subject of this solicitation. You must provide the name, contact information and a description of the supplies or services provided. You must attach your references with the responsibility forms. Please ensure that your references are willing and able to provide a response in that timeframe.

 **3.5.6. Licensing**. Vendor must provide a detailed explanation of any software and hardware licensing requirements of the system in total, including an explanation of all of the following that apply: end-user licensing, software module licensing, concurrent user licensing, per-user licensing, per-seat licensing, perpetual per-server licensing, license maintenance, third-party licensing, other licensing requirements.

**3.6 OPTIONS**

Vendors are encouraged to offer, at their sole discretion, optional additional modules or packages that they may view to offer additional value to NSO.

**3.7 TERM OF CONTRACT**

The contract awarded pursuant to this Request for Proposals will commence on the date of signature by the Executive Director and continue for a base term of 5 years, with five (5) one (1) year renewal options, subject to termination clauses described in the executed contract.

**3. 8 RENEWAL**

The NSO reserves the right to renew for a total of five (5) years subsequent to the initial five year term, in one of the following manners:

a) One renewal covering the entire renewal allowance,

b) Individual one-year renewals up to and including the entire renewal allowance, or

c) Any combination of full or partial-year renewals up to and including the entire renewal allowance.

Renewal shall be subject to the same terms and conditions as the original Contract. The Contract may not renew automatically, nor may the Contract renew solely at the Vendor’s option. The total contract term, including all renewals, will not exceed ten (10) years.

**3.9 CONTRACT TERMINATION**

At the end of the Contract, all of the data residing on the CXRS belongs to NSO and must be surrendered to NSO. The Vendor and NSO will mutually determine a schedule for the surrender of data in order to accommodate any system conversion that may then be in progress. The Vendor agrees to destroy any copies of NSO data in its possession.

**3.10 LEGAL TERMS**

You must follow these guidelines and requirements when preparing and submitting your proposal:

1. Late proposals will not be accepted, opened, or read, under any circumstances.
2. NSO may, at their discretion and without explanation to the prospective Vendors, at any time choose to discontinue this process without obligation to such prospective Vendors.
3. The statements made in your proposal are binding; therefore an authorized representative of your company, preferably an officer, must sign your proposal.
4. Your proposal must clearly state any need for sub-partners, the work they will perform, their names, addresses, telephone numbers, email addresses, and expertise. NSO will not refuse a proposal based upon the use of sub-partners; however we retain the right to refuse the sub-partners you have selected.
5. By submitting a proposal the Vendor agrees to all the terms and conditions of this Request for Proposal.
6. NSO does not bind itself to accept either the lowest cost proposal or any proposal submitted.
7. NSO will not be liable for any costs or expenses incurred in the preparation of a proposal.
8. The Vendor, if chosen, shall undertake to indemnify <Sport Organization> against claims and litigation (including legal fees) related to/arising from the activities of the vendor.
9. The Vendor, if chosen, shall undertake to disclose any conflicts of interests in the provision of the services.
10. In participating in this proposal, the Vendor will not discuss or communicate, directly or indirectly, with any other company/vendor or any director, officer, employee, agent or representative of any other company, the preparation or presentation of their proposals.
11. NSO reserves the right to and may exercise any or all of the following rights and options with respect to this RFP:
* To reject any and all proposals, to seek additional proposals, to enter into negotiations and subsequently contract with more than one company if such action is in the best interests of NSO, and to award or refuse to award a contract on the basis of criteria other than price. NSO will not be required to provide reasons for accepting or not accepting any particular proposal;
* To evaluate separately the individual components of each proposal, and decide to contract with such company for any such individual component(s);
* At its sole discretion to cancel or withdraw this RFP with or without the substitution of another RFP, to alter the terms and conditions of this RFP (including, without limitation, extending the times and deadlines referred to in this document), and to conduct investigations as to the qualifications of each company at any time;
* To alter the proposed implementation schedule at its sole discretion.
* To not be bound at any time to the acceptance of any RFP and in no way does this invitation to treat process bind NSO into any contractual relationship whatsoever.
* To contact companies to clarify or confirm information, without obligation to other companies;
* Invite companies to provide brief presentations.
* Negotiate with one or more companies.
1. The selection of any company is conditional upon the negotiation and execution of a satisfactory contract between NSO and the company. NSO will incur no liability to any company as a result of these discussions, negotiations or modifications.
2. The company(s) will indemnify and hold harmless <Sport Organization> and its directors, officers, consultants, agents and employees (“The <Sport Organization> Indemnified Parties”) from and against any and all loss of, or damage to, property, or injuries to, or death of, any person or persons and will defend, indemnify and hold harmless The <Sport Organization> Indemnified Parties, or any of them, from any and all claims, damages, suits, costs, expenses, liabilities, fines, obligations, penalties, demands, actions or proceedings of any nature or kind whatsoever (including, without limitation, legal fees and disbursements) of or by anyone whosoever, resulting from, or arising out of, directly or indirectly this RFP.

End of Instructions

**SECTION 4 - PROPOSAL TO NSO**

**<Sport Organization> Registration System**

The undersigned authorized representative of the identified Vendor does hereby submit this Proposal to perform in full compliance with the subject solicitation. By completing and signing this Form, we are making a Proposal to NSO that NSO may accept. We are also certifying to compliance with the various requirements of the solicitation and the documents contained in the solicitation.

Vendor hereby certifies that no person or entity representing their proposal has retained a person or entity to attempt to influence the outcome of a procurement decision for compensation contingent in whole or in part upon the decision or procurement.

We have marked each blank below as appropriate and have used N/A when a section is not applicable to this solicitation. We understand that failure to meet all requirements is cause for disqualification.

**We have:**

\_\_\_\_ Reviewed the Proposal Form, including all referenced documents as well as the solicitation Instructions, filled in all relevant blanks, provided any requested information, and

\_\_\_\_ Signed on the space(s) provided.

**Acknowledgment of Amendments**

\_\_\_\_ We acknowledge receipt of any and all amendments to the solicitation and have taken those into account in making this Proposal.

**Proposal Response Forms:** Accompanying and as part of this Proposal you will find:

**For all Proposals**

\_\_\_\_ 1 electronic copy of your technical proposal in searchable PDF; 1 electronic copy of the price proposal in a separate PDF file..

\_\_\_\_ Completed Responsibility Information:

Business and Directory Information

Evidence of Financial Stability

Disclosure of Legal Proceedings

 References

\_\_\_\_ Response to Specifications / Qualifications / Statement of Work and Price sections completed and submitted in separate sealed envelopes in the Proposal package.

**Negotiations**

If we are selected for award, we understand that does not entitle us to a contract. We further understand the award is conditioned on favorable resolution to successful negotiation of terms and conditions including, but not limited to price and any exceptions requested.

**Vendor Contact Person:** The contact person for purposes of responding to any questions the State may have is:

Printed Name Title

Address

Phone Fax

Email

(Vendor name and DBA)

(Signature of party authorized to bind the named Vendor)

Printed Name Title

Address

Phone E-mail

**SECTION 5 - RESPONSIBILITY INSOORMATION**

We have identified various information we need in order to determine if you are eligible to contract with NSO and can be considered a ”Responsible” Vendor.

You will need to provide the following information as set out in the noted sections.

Business and Directory Information Form (see following)

Evidence of Financial Stability (provision of financial statements from the previous 3 fiscal years, preferably audited if available)

Disclosure of Legal Proceedings

 References

**5.1 BUSINESS AND DIRECTORY INSOORMATION**

(a) Name of Business (Official Name and D/B/A)

(b) Business Headquarters (include Address, Telephone, Email and Facsimile)

(c) If a Division or Subsidiary of another organization provide the name and address of the parent

(d) Billing Address

(e) Name of Chief Executive Officer

(f) Customer Contact (include Name, Title, Address, Telephone, Toll-Free Number, Facsimile and E-mail)

(g) Company Web Site

(h) Type of Organization (i.e., Sole Proprietor, Corporation, Partnership, etc. -- should be the same as on the Taxpayer ID form below)

(i) Length of Time in Business

(j) Annual Sales (for most recently completed Fiscal Year)

(k) Number of Full-Time Employees (average from most recent Fiscal Year)

(l) Type of and description of business

(m) Place of incorporation

(n) Identify and specify the location(s) and telephone numbers of the major offices and other facilities that relate to the Vendor’s performance under the terms of this solicitation.

**5.2 FINANCIAL STATEMENTS**

Please provide financial statements from the previous 3 fiscal years (preferably audited if available).

**5.3 DISCLOSURE OF LEGAL PROCEEDINGS**

Vendor must provide disclosure of any current, previous or anticipated legal proceedings which may materially affect their ability to deliver under this potential agreement.

**5.4 REFERENCES**

You must provide references from entities for which you have implemented and maintained a sports registration system (minimum of three), that can attest to your experience and ability to perform the contract subject of this solicitation. You must provide the name, contact information and a description of the supplies or services provided. You must attach your references with the responsibility forms. Please ensure that your references are willing and able to provide a response in that timeframe.

**SECTION 6 - RESPONSIVENESS**

**Executive Summary:**

The Vendor must submit an Executive Summary outlining:

* Knowledge of and experience with Registration and Membership for Sporting Organizations
* Innovation and distinction in your offerings
* Commitment to highest level of quality control and service
* Willingness to work with the partners of NSO

**POINT-BY-POINT RESPONSE:**

The Vendor must respond to each of the following sections of the Solicitation and of the CXRS Statement of Requirements:

CXRS Statement of Requirements:

* Sections 4 through 7.

Solicitation sections:

* SUPPLIES AND/OR SERVICES REQUIRED: All of Section 3.2
* VENDOR QUALIFICATIONS : Section 3.5.1, 3.5.2, 3.5.3, 3.5.4, 3.5.6

You must follow any format shown or referenced below. If no specific format is provided for certain Sections of the RFP, you may respond free form provided you address all the points, numbering each point as found in Section 3 and addressing them in the order they appear.

**REQUIRED FORMATS:**

For each system requirement noted in the CXRS Statement of Requirements, beginning with Section 4 and continuing through Section 7, the Vendor shall indicate:

* If the requirement is currently provided by their proposed solution (“Current”);
* If the requirement will be met by supplemental modification of their current solution (“With Mods”);
* If the requirement will not be met.

For each requirement not met, the Vendor must provide an explanation as to why the requirement cannot be met and, if appropriate, propose an alternative solution. For each requirement met or exceeded, Vendors are encouraged to provide pertinent information regarding past experience, the means by which the requirement will be met, or any additional functionality that can be provided. Explanations/Supplemental Information can be provided in a referenced attachment, as opposed to the body of the proposal when appropriate. The basic response format is set forth below.

SWIMMING REGISTRATION SYSTEM STATEMENT OF REQUIREMENTS

|  |  |  |  |
| --- | --- | --- | --- |
| Section |  | Met | Not Met |
| 4 | Requirement: The CXRS shall accommodate …..  | Current |  |
| Explanation/Supplemental Information: |
| 4.1 | Requirement: The CXRS shall support…. | With Mods |  |
| Explanation/Supplemental Information: |
| 4.1.1. | Requirement: The NSO Administrator shall be able to… |  | Not Met |
| Explanation/Supplemental Information: |

**SUPPLIES AND/OR SERVICES REQUIRED:**

Respond to all of Section 3.2 in the following format.

For each requirement noted in the Solicitation section 3.2, the Vendor shall indicate:

* If the requirement will be met;
* If the requirement will not be met.

For each requirement not met, the Vendor must provide an explanation as to why the requirement cannot be met and, if appropriate, propose an alternative solution. For each requirement met or exceeded, Vendors are encouraged to provide pertinent information as to how they intend to meet the requirement. Explanations/Supplemental Information can be provided in a referenced attachment, as opposed to the body of the proposal when appropriate. We encourage brief responses that quickly and easily demonstrate your compliance. The basic response format is set forth below.

|  |  |  |  |
| --- | --- | --- | --- |
| Section |  | Met | Not Met |
| 3.2 | Requirement: …..  | Yes |  |
| Explanation/Supplemental Information: |
|  | Requirement: …. |  | Not Met |
| Explanation/Supplemental Information: |
|  | Requirement:  |  | Not Met |
| Explanation/Supplemental Information: |

**VENDOR QUALIFICATIONS**

Respond to all of Sections 3.5.1, 3.5.2, 3.5.3, 3.5.4, 3.5.6.

For each section noted the Vendor shall provide a description responding to the information requested.

|  |  |  |  |
| --- | --- | --- | --- |
| Section |  |  |  |
| 3.5.1 | Vendor Qualifications and Experience  |  |  |
| Description: |
| 3.5.2 | Software Development and Support Capabilities |  |  |
| Description: |
| 3.5.3 | …… |  |  |
| Description: |

**SECTION 7 - PRICE**

**7.0 PRICE SUBMISSION:** Vendor is requested to submit one (1) pricing proposal, assuming a 5-year base term with five (5) one (1) year renewal options. The Price Proposal must be submitted in a separate file from the technical proposal.

Each price proposal must be based on a monthly Software-as-a-Service (SAAS) Fee commencing <…> and completing on <…>. As NSO wishes the Vendor to share in the benefit of increased utilization of the system, the pricing submitted must be a function of utilization of the system. Thus, the Monthly SAAS Fee may be provided as a “Per Transaction” Fee or another fee that is a reflection of utilization (however NSO would discourage a % of transaction value fee (other than for the required payment processor fees)).

Vendors must utilize the System Sizing Assumptions set out in section 3.1.7 as their basis for transaction volumes and, based on this, calculate an anticipated Total Cost of Service over the term of the agreement.

NSO would also allow Vendors the option to propose a discounted price if they wish NSO to consider providing an Initial Set-Up Fee (to be paid upon Acceptance of the software service) in addition to the ongoing monthly SAAS fee.

**7.1 METHOD AND RATE OF COMPENSATION:**

 **7.1.1. Pricing Proposal for 5-year base term**

**Base Term:**

Monthly ongoing SAAS Fee : $ based on a \_\_\_<per transaction or otherwise>\_\_\_\_\_\_\_\_\_\_\_\_

 Payment Processor Fee(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*{Values in this table should reflect best estimate of current and future volumes}*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **2014-2015** | **2015-2016** | **2016-2017** | **2017-2018** | **2018-2019** |
| No. of Unique Registrants | 60,000 | 80,000 | 100,000 | 120,000 | 140,000 |
| Gross Transaction Value | $12,000,000 | $16,000,000 | $20,000,000 | $24,000,000 | $28,000,000 |
| No. of Transactions | 60,000 | 80,000 | 100,000 | 120,000 | 140,000 |
| Annual SAAS Fee |  |  |  |  |  |
| Annual Payment Processor Fee |  |  |  |  |  |
| **TOTAL ANNUAL COST**  |  |  |  |  |  |

 **TOTAL COST OF SERVICES TO AUG 31, 2019 (Sum of Total Annual Costs): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

 **7.1.2. Pricing Proposal for Renewal Option Years**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **2019-2020** | **2020-2021** | **2021-2022** | **2022-2023** | **2023-2024** |
| Annual SAAS Fee |  |  |  |  |  |
| Annual Payment Processor Fee |  |  |  |  |  |
| **TOTAL ANNUAL COST**  |  |  |  |  |  |

**7.3 EXPENSES:** Unless otherwise specified, this contract does not allow for reimbursement of any expense incurred by Vendor, including but not limited to telephone or other communications device, postage, copying, travel, transportation, lodging, food and per diem.

**7.4 PAYMENT TERMS AND CONDITIONS:** Payment will be made for the SAAS Fee on a monthly basis, in arrears.

**7.5 HOURLY RATES:** NSO may from time to time request the Vendor to provide development or support services on an hourly rate basis beyond the scope of this agreement. Vendor agrees to commit to the following hourly rates for these services:

**7.6 OPTIONAL DISCOUNTED PRICE OFFER:**

The Vendor may optionally offer a discounted price if they wish to utilize a pricing model that includes a fee for the initial set-up of the service. The Initial Set-Up Fee would be paid upon Acceptance of the software service. This option would only be considered if it offers a reduction in the Total Cost of Service over the 5 year contract term.

 Initial Set-Up Fee:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Monthly ongoing SAAS Fee : $ based on a \_\_\_<per transaction or otherwise>\_\_\_\_\_\_\_\_\_\_\_\_

 Payment Processor Fee(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **2014-2015** | **2015-2016** | **2016-2017** | **2017-2018** | **2018-2019** |
| No. of Unique Registrants | 60,000 | 80,000 | 100,000 | 120,000 | 140,000 |
| Gross Transaction Value | $12,000,000 | $16,000,000 | $20,000,000 | $24,000,000 | $28,000,000 |
| No. of Transactions | 60,000 | 80,000 | 100,000 | 120,000 | 140,000 |
| Annual SAAS Fee |  |  |  |  |  |
| Annual Payment Processor Fee |  |  |  |  |  |
| **TOTAL ANNUAL COST**  |  |  |  |  |  |

 **TOTAL COST OF SERVICES TO AUG 31, 2019 (Initial Set-Up Fee + Sum of Total Annual Costs): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**7.7 OPTIONAL MODULES**

Vendors must provide pricing for any optional modules they may wish to offer as part of their Proposal.

**SECTION 8 – CONTRACT**

This Section is provided solely for the Vendor’s information. It need not be completed and signed at this time.

We expect to contract based on the terms and conditions set forth in the attached Contract. If you are unable to accept one or more parts of the Contract, identify any exception that you want us to consider. You may show these changes on the Contract form itself by striking over language you may wish us to consider changing, and underlining alternate language or by listing the sections and showing the alternate language on a separate page. You must provide these exceptions requests and alternate language with your Proposal. Please note that many contract provisions are required by law or policy. Any proposed changes may be considered as part of the evaluation.