



Request for Proposal (RFP) – 4-H Ontario Participant Database Project 2022-2023

Organization Overview

4-H Ontario is a non-profit positive youth development organization that builds youth as leaders within their communities and assets to the world. With roots in rural Ontario, it is open to all youth across the province. Each year, 4,000-6,000 4-H youth ages 6–21 and approximately 1,400-2,000 screened, engaged volunteer leaders come together to learn about selected topics through fun hands-on activities and mentorship through our proprietary curriculum (known as Project Resources) and organizational specific information, made available through our website. There are also provincial camps, conferences, competitions and national and international travel opportunities available to further develop skills in leadership, business, self-confidence and more. 4-H provides youth with a place they can be involved, accepted, valued and heard while developing valuable skills for leadership and life.

4-H Ontario is supported by the Ontario 4-H Council provincial Board of Directors. The Ontario 4-H Foundation provides continuing financial support.

Introduction / Project Overview

4-H Ontario is currently opening a call for proposals for the redevelopment of its data management system, that will include integration with our website (www.4-hontario.ca) for online registration and participant profile sharing, youth and volunteer participant record storage, capturing of award and recognition information, management of club and opportunity participation and comprehensive reports. The current database (Membership Web application) was first introduced about 20 years ago and custom designed, with a major upgrade in 2010. The new database should be user-friendly, allowing for a variety of users with varying levels of expertise to work within it. There should be mobile app integration, allowing participants to register for the 4-H program and specific clubs and to view their participant profile. Above all, there should be capability within the new system to capture a vast amount of information and to report on all aspects of information captured in a user-friendly format.



Project Timelines

Event	Date
RFP Question Period	Aug 8-12, 2022.
Closing Date & Time	August 22, 2022 at 4:00pm
Shortlisted Proponent Presentations	September 6&7, 2022.
RFP Award	September 9, 2022.
Launch of a Test Environment	April 1, 2023.
Training for Test Users (staff and key volunteers)	April – May, 2023.
Training for all staff and Association volunteer users	June-July, 2023.
Final transfer of all data to new data management system	September 1, 2023.
Full integration of new data management system	October 1, 2023.

Proposal Information and Selection Process

Communications and Contact Information

All communication concerning this RFP shall be in writing and directed to:

Megan Burnside-Poitras
 Volunteer & Database Manager
 4-H Ontario
 Email: volunteers@4-HOntario.ca
 Phone: 613.929.7353

Kelly Clarke
 Database Specialist
 & 4-H Ontario
 Email: database@4-HOntario.ca
 Phone: 647.210.8849

Submission of proposal

An electronic proposal package shall be submitted at or before the closing date and Time:



Monday August 22, 2022, at 4:00pm to volunteers@4-hontario.ca and database@4-hontario.ca.

Please provide the proposal name, as well as the company name and contact information in the proposal.

Contents

Please submit an electronic copy of the proposal via email. Please read all sections carefully to ensure a complete proposal is submitted.

Proposal Evaluation

All proposals will be processed, reviewed, and evaluated according to the comprehensive evaluation criteria listed below.

Submission Criteria	Points
Approach and implementation plan	30
Experience & Qualifications Including relevant experience	20
Technical Recommendations	20
Financial	15
Project and Organizational understanding	15
Total	100
Interview (added re-evaluation of the above sections)	100

Proposals should include the following information:

- Company profile,
- Project team, qualifications, and relevant experience,
- References,
- Implementation plan including preferred methodology, detailed timelines, risk management, etc.
- Data Management Plan (including privacy protection),
- Support and Maintenance plans and ongoing financial investment (i.e., licensing fees, system upgrade fees, etc.),
- Financial breakdown,



- Value-added features,
- Hardware and storage requirements.

Invitation issued for presentation:

The highest-ranking submissions will be invited to make a confidential presentation before an interview panel of 3-4, 4-H Ontario stakeholders to demonstrate the following:

- Knowledge of application
- Technical knowledge
- Ability to meet requirements outlined
- Quality of work

Selection

Upon approval to award the proposal from the 4-H Ontario Council, the Volunteer & Database Manager and Database Specialist shall contact the selected Proponent to confirm approval.

Budget Details

\$100,000 – \$150,000 total budget including contingency, all applicable taxes and fees.

Current System Overview

4-H Ontario is requesting the support of industry professionals who have the expertise to lead us through the technical needs of the project and advise us on industry best practices.

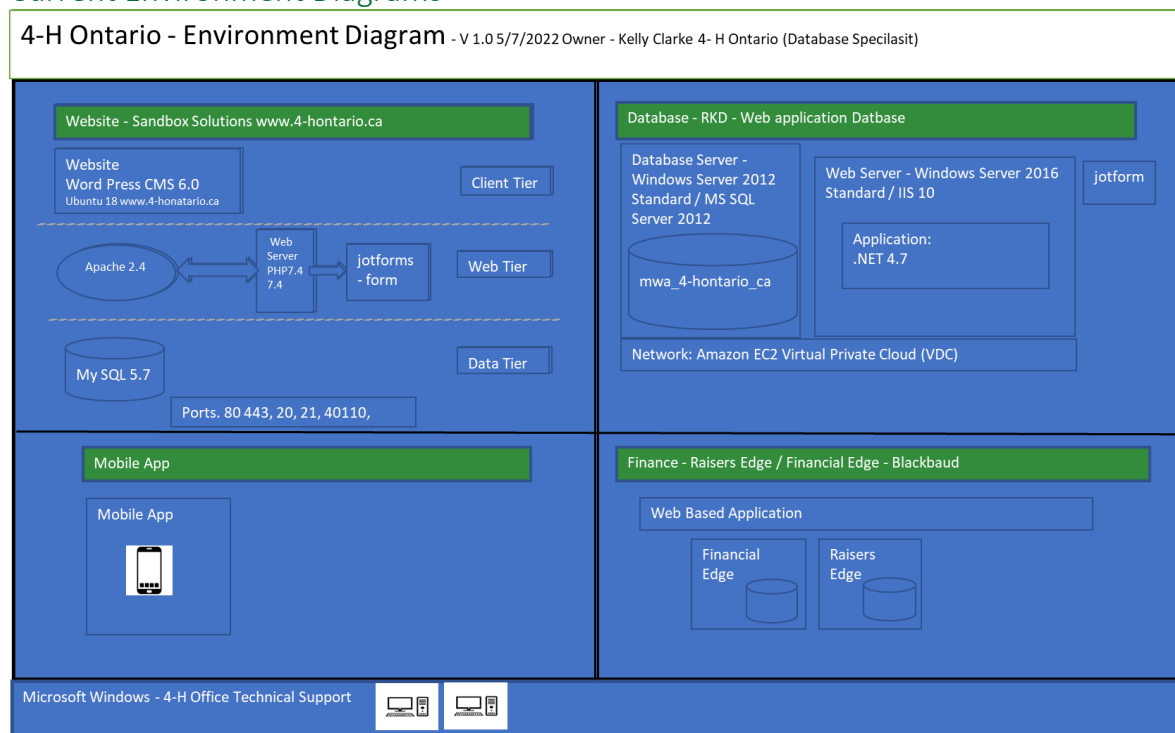
- 4-H Ontario last completed a robust database redevelopment project in 2010, with continuous improvements being made over time, particularly throughout 2022.
- Our current database uses dated technology that is not easily supported on an ongoing basis and does not allow for user-friendly report creation and statistical management. Integration capabilities for the current system to work alongside our website are also a challenge.
- Currently, online registration for youth participants & volunteers and event registration are being managed through a 3rd-party platform called JotForms.
- The current database captures all participant (youth and volunteer) basic contact information, statistical information, screening and training information, award



and recognition records, club/project records, Local Association (chapter) and regional board volunteerism, and provincial opportunity participation information.

- Program operations with 4-H Ontario make it necessary for a large series of individuals in distinct roles to have differing levels of access to the database (i.e., staff, local volunteers, etc.)

Current Environment Diagrams



Considerations for Upgraded Data Management System

Objectives

To accommodate the full spectrum of our stakeholders, there are several high-level objectives to be considered.

- Ensure database architecture is easily adaptable and responds to stakeholder demands, ensuring that 'frequently accessed' information is in a prominent location for all users.
- Event and program registration with payment, along with participant, club, opportunity, and award management.
- Accessible online applications with mobile App interfaces.



- Ability to link participants by relationship (household/family, professional affiliation, etc) and to flag key participant details (i.e., roles, screening/training status, etc.).
- Ability to flag youth participant and volunteer deadlines for renewal of several components (membership fee expiry, screening, training, registration, etc).
- Ensure that participants can view and edit their profiles and that secure users have access to the information they need.
- Ability to house links or copies of documents pertaining to screening and training, etc. within user profiles.
- Flexibility in reporting and statistical capturing of information.
- Highest standards for data collection, security and information storage.
- Opportunity to be able to grow the stakeholder platform and archive historical data.

User considerations

Our current user base is largely rural with limited internet access. Database solutions should reflect these limitations.

We currently allow access to the Membership Web Application to several user roles;

- Administrators: 2-3 users organization-wide,
- General Staff: 14-16 users organization-wide,
- Volunteer Support Staff: 4 users organization-wide,
- Local Association (chapter) Membership Coordinators: 52 users organization-wide
- Local Association (chapter) Screening Contacts: 52 users organization-wide

We would like to allow limited access to the database to;

- Local club volunteers with the ability to have shared security with 1 or more association members in a particular role. (e.g Membership Coordinator/Secretary), allowing them to access participant information for those involved in their programs,
- Individual participants, allowing them to access and edit their participant profiles as needed, restricted to just contact information,
- Named Local Association (chapter) volunteers in certain roles, allowing them access to information that would benefit their role.



Functional Requirements

- Development/Test Database to be provided,
- Importer and integration (real time) of online registrations via our website www.4-hontario.ca to the database, able to verify if existing member, update or create new profile,
- Secure login for various levels (participants, club leaders, Association volunteers, staff (various levels), administrators, etc.) ability to share the security permissions across different roles, when necessary,
- Content management with user permissions assigned to limit specific users to view/edit certain types of content. The system will send workflow notifications to users notifying them of actions they need to take (i.e., approving registrations, memberships etc.). The database must be easy to use, scalable, and allow for continuing advancement in functionality as growing needs are identified.
- Mobile App integration, allowing for users to register and to view and edit their profile,
- All actions and entries have a traceable history allowing for the tracking of both user and date/time for actions and processes,
- Administrators and users can change and/or reset their passwords,
- Notification process for any privacy breaches and rectification,
- Uses industry best practices that ensure a flexible, sustainable, extensible framework for ongoing database evolution,
- Provide management of migration from current database, including necessary clean-up of raw data, ensuring a backup of this data is kept at cut over,
- Reporting available for population in Excel and PDF formats,
- Bulk updating capability for various fields,
- Auto-creation of electronic participant cards for registered participants in good standing,
- Easy-access registration for new and continuing participants, ensuring that any existing participant history is properly carried forward,
- Ability to archive participant records,
- Provision of a Database Monitoring tool, to be able to monitor availability and resource consumption, measure and compare throughput, track database changes, and monitor logs,
- Data backups to be taken and retained for an agreed period,



- Ability to create an LMS (learning management system) or integrate with an out-of-box LMS system.

Note: 4-H Ontario has developed a cross-departmental committee tasked with the management of this project. Detailed process maps illustrating ideal conditions for the new data management system are available on request.

Resources

Website URL: www.4-Hontario.ca

Brand Standards: <https://4-hontario.ca/about-4-h/policies/appendix-e-4-h-brand-standards-manual/>