



The Edmonton Federation of Community Leagues

Request for Proposals

Information Technology Development

& Infrastructure 2012

Released: January 19, 2012
Contact: Valerie Pachal
Assistant Director
communications@efcl.org

Request for Proposals for Information Technology

EFCL is moving forward with four technology development projects this year. Ideally, we will find a technology company that is diverse enough to manage all of our technology requirements.

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Background of our Organization

EFCL celebrated its 90th Anniversary in 2011. As the umbrella organization for Edmonton's 154 leagues, EFCL has grown beyond compare. No other organization in North America has such a well developed system of volunteers within communities that provides sports, recreation, culture, and educational opportunities while addressing transportation and land use issues. Read [our history](#) , see our [benefits of membership](#), and check out our [resources](#) for more information.

EFCL's purpose is to foster healthy neighborhoods and sustainable community leagues in Edmonton by providing advice, support and coordination of the community league movement in Edmonton.

EFCL Business Plan, 2009-2013 outlines our goals and activities in detail. It can be found in our [document library](#).

EFCL fosters healthy neighborhoods is by providing advice and support to community leagues, liaises with the City and Leagues to give input on urban planning issues, and EFCL speaks on behalf of community leagues on urban planning issues. As well, we help the public connect with their leagues and serve as a promotional source for the community league movement. For more details on our planning role visit [Planners Home](#)

For our programs in the Arts, Entertainment, City Wide Events, Community Development, and Green Movement visit our News / Activities.

RESOURCES and CONTACTS

Point of contact/ project manager: Valerie Pachal, Assistant Director. Valerie.Pachal@efcl.org
780.437.2913

Technology issues and MSSQL access will be managed by Victor Polman at the Corymb Group.
victorpolman@corymbgroup.com 630.457.4046

FORMAT FOR PROPOSALS

Executive Summary

Technical Volume

Tool development process: explain the process you will follow to build the tool, including steps and evaluation

Address usability standards and testing procedures

Address any important technology information and specifications used in your solution (languages, platform, etc.)

Management Volume

Organizational structure: communication process; including lines of reporting and any special tools used.

Schedule of deliverables; include major milestones and testing proposal.

Budget Volume

Break down cost by:

Production hours, tools and functionalities

Maintenance and support: ID costs / hourly rate for later customization or increased functionality of the tool.

Other charge areas: Please ID whether there will be other expenses, consulting fees, future work, etc. to complete this project.

Attachments

Qualifications and Experience: relevant case histories with information on accessing online demos or examples

Biographies of all who will work on account

Professional references.

TERMS and CONDITIONS:

The Edmonton Federation of Community Leagues must own, have full access to, and have the right to customize project code.

All data made available is supplied in confidence and will not be used for any other purpose than specified in the proposal for the creation of outlined technology.

Terms for proposal:

Proposals should be delivered to Valerie Pachal communications@efcl.org in MS Word or pdf. Please request read receipt to confirm proposal is received.

All proposals must include a statement of authorization to bid signed by a principal of the responding company.

All proposals must use the proposal format outlined on page 2.

Parties submitting separate proposals may not discuss pricing information amongst each other or they will be ineligible to bid on the project.

Bidder status: bidder must disclose any relevant conflicts of interest and/or pending lawsuits.

Any additional costs above the accepted bid must be confirmed in advance of incurring those costs and approved by the Edmonton Federation of Community Leagues.

PROJECT 1: Issue of Membership Card for Online Sales

Deadline for submissions: February 17, 2012

DESCRIPTION: The EFCL will issue cards for memberships sold online upon completion of payment.

BUDGET: Approximately \$2000 - \$3000

TERMS and CONDITIONS:

See General Terms and Conditions on page 1.

Relevant dates :

- Project questions accepted until February 1, 2012 – answers will be shared via email to all bidders by February 8, 2012
- Bid to be submitted by February 17, 2012
- Interviews to be conducted by February 27, 2012
- Bid to be accepted by February 28, 2012
- Data analysis and plan completed by March 2, 2012
- Development done by April 1, 2012
- Serial number data populated in tables and testing and debugging to be completed by April 15, 2012
- Project to be fully rolled out and debugged by April 30, 2012

1. Details - PROJECT 1: Issue of Membership Card for Online Sales

1.1. AUDIENCE

1.1.1. The public who currently purchase their memberships for Community Leagues in our online store will benefit from immediate issuance of a printable card upon completion of payment.

1.2. SUMMARY OF CURRENT STORE PROCESS

- 1.2.1. A person navigates to the store through efcl.org / league directory. When they enter their postal code there is an option to purchase a membership or lookup the league in the directory below. The postal code ensures that a member buys from the league where they live.
- 1.2.2. They choose the type of membership, and proceed to checkout. Information entered sets up a user on the website. At the close of the forms they are redirected to Paypal's secure transaction site.
- 1.2.3. If they pay immediately, the transaction is posted as paid. If they pay by E-Check the transaction is posted as pending; we would not issue a card until notification is received that the E-Check is cleared and we manually adjust the payment to paid.
- 1.2.4. New member receives a receipt and the league receives a notification to which they should respond with issuance of a card and skate tags.

1.3. THE NEW TOOL FUNCTIONALITY

- 1.3.1. We will activate the serial number feature of CataLOOK store module to generate a unique membership number.
- 1.3.2. A stored procedure should be initiated as soon as a paid status is posted to a sale in the store. Most transactions are immediate. Some are paid by ECheck and payment take approximately one week to complete. These are manually updated to paid status after the payment goes through.
- 1.3.3. The template card (sample on page 5) will be populated with Community League Membership Card Information: Community League, Product Name (Year of card, membership type), family name, address, league website, league telephone, league email, Serial no (unique membership card number)
eg. Parkdale Cromdale Community League
2012-2013 Parkdale Cromdale Family Membership
Surname(s): Somebody – Nobody
Address: 7103 – 105 Street (no postal code)
www.parkdalecromdale.org info@parkdalecromdale.org 780-477-4717
12-500001 (serial no)
- 1.3.4. Also on the template should be advertisement at the bottom of the page which we may edit as needed or advertising space is sold.
- 1.3.5. The card will be emailed to the purchaser to the email provided in the sales forms.

1.4. TECHNOLOGY AND REPORTING REQUIREMENTS

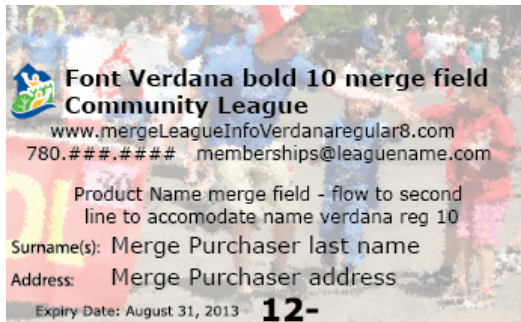
- 1.4.1. We are currently using Dot Net Nuke 6.01.02 as the application framework for our website. The store module is CataLOOK 6.4.4. Familiarity with the application and module is a key asset. Coding fluency in dot net for aspx sites.
- 1.4.2. Fluency in MSSQL is a must. We are using MS SQL, SQL Server 8.0, Windows Server 8.0.
- 1.4.3. The application is hosted through the Corymb Group and access to structure will be through their designated representative. Contact info on page 1. Access to the tables where the product sale information and league information is stored will be given upon confirmation of proposal acceptance.

1.5. Sample – Printable online membership

Dimensions :

card 3.375 x 1.9375 inches

print area 6.75 x 8.5 inches



Font Verdana bold 12 merge field
Community League



Member of the
**Edmonton Federation of
Community Leagues**
www.efcl.org 780.437.2913 info@efcl.org
Information collected is solely for league purposes.
It is never sold or released for commercial purposes.

Community League Day is September 15, 2012

Join a party near you!

Info at: [efcl.org / news / community league day](http://efcl.org/news/community_league_day)

Thank you for joining merge field community league arial 12

BENEFITS OF MEMBERSHIP

A great way to meet your neighbours and make friends

Educational programs and recreation opportunities

Skill development workshops

Access to hall rentals, skating rinks, tennis courts,
basketball courts, & more

Have a say in facility and park development, traffic
management, and urban planning

Special community skate & swim times

Discounts at City recreation centers for annual and
multi admission passes

Safety and crime watch programs

Fun, socials, & programs for cultural gatherings,
parents, playschools, youth, seniors -



VENDOR COUPON GOES HERE

PROJECT 2: Subscription Module

Deadline for submission: February 17, 2012

DESCRIPTION: The EFCL is looking to automate their electronic news / newsletter subscription. Currently, we process subscribe and unsubscribe updates to the data structure manually upon request. Although the stored procedures are relatively simple form updates, we would like a slick looking extension that automatically updates the relevant tables in our data structure.

BUDGET: Approximately \$800 - \$1500

TERMS and CONDITIONS:

See General Terms and Conditions on page 1.

Relevant dates:

- Project questions accepted until February 7, 2012 – answers will be shared via email to all bidders by February 13, 2012
- Bid to be submitted by February 17, 2012
- Interviews to be conducted by February 23, 2012
- Bid to be accepted by February 24, 2012
- Data analysis and plan completed by March 2, 2012
- Development done by April 1, 2012
- Serial number data populated in tables and testing to be completed by April 15, 2012
- Project to be fully rolled out by April 30, 2012

2. Details – Project 2: Subscription Module

2.1. AUDIENCE

2.1.1. The public who does not yet receive our notices.

2.2. SUMMARY OF DISTRIBUTION SUBSCRIPTION

2.2.1. The user through a link on our news or our website is directed to a page with the subscription module. They enter their email, first and last name and either subscribe or unsubscribe. This will not be active for snail mail requests.

2.3. THE NEW TOOL FUNCTIONALITY

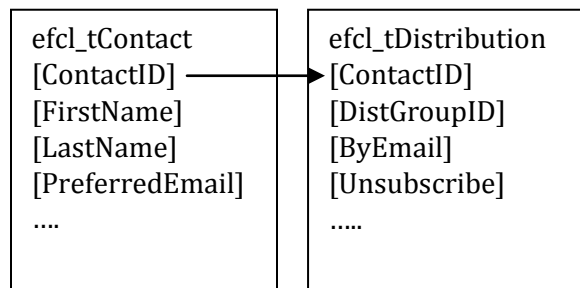
2.3.1. With subscribe:

- A check will be performed on our contact database for the email, first, and last name.
- If already in the contact table than a check is performed for distribution. If previously unsubscribed they are resubscribed; if subscribed it is left as is; if no distribution record a new one is added to the distribution table to reflect email subscription
- If not in the contact table then the contact is added to the contact table and the new contactID is inserted in the distribution table with [DistGroupID] =1 (email) and [ByEmail] = -1 (bit field = yes)

2.3.2. With unsubscribe:

- A check will be performed on our contact database for the email, first, and last name.
- If already in the contact table than a check is performed for distribution. If unsubscribed they are resubscribed [ByEmail] = -1; if subscribed it is left as is, if no distribution record a new one is added to reflect they do not want to receive emails. [ContactID] is inserted, [DistGroupID] =1 (email) , [ByEmail] = 0, [unsubscribe] = -1
- If not in the contact table, then no updates are performed. In this case, an email should be sent indicating that they are not subscribed and must be receiving the email through a forwarding email address

2.3.3. Data Structure



Irrelevant fields have been omitted

2.3.4. Improvements and suggestions to the flow will be considered however this is a very basic data update.

2.4. TECHNOLOGY AND REPORTING REQUIREMENTS

2.4.1. We are currently using Dot Net Nuke 6.01.02 as the application framework for our website. We prefer development of a coded module and release of the code is required.

2.4.2. Fluency in MSSQL is a must. We are using MS SQL, SQL Server 8.0, Windows Server 8.0.

2.4.3. The application is hosted through the Corymb Group and access to structure will be through their designated representative. See page 1 for contact information.

PROJECT 3: Online Data Entry Interface

Deadline for Submission: March 30, 2012

DESCRIPTION: The EFCL is looking to replace the current Access data entry interface to its MSSQL database with online forms.

BUDGET: Approximately \$3000 - \$5000

TERMS and CONDITIONS:

See General Terms and Conditions on page 1.

In the attachment portion of your proposal include samples of similar interfaces via functional URL (public sites or login provided) and screenshots along with references for those sites.

Relevant dates:

- Project questions accepted until March 7, 2012 – answers will be shared via email to all bidders by March 21, 2012
- Bid to be submitted by March 30, 2012
- Interviews to be conducted by April 15, 2012
- Bid to be accepted by April 26, 2012
- Data analysis and plan completed by May 15, 2012
- Development done by June 15, 2012
- Implementation and debugging to be completed by July 11.

3 Details – Project 2: Online Data Entry Interface

3.1 AUDIENCE

- 3.1.1 In Phase I of this project for which this RFP is written, the data entry forms will be used by staff only to update our member information.
- 3.1.2 Phase II will implement forms that filter member specific data based on user and role for our community league members to edit. This project will be on the next RFP unless a competitive offer comes in that can have this functionality roll out within a few months of testing Phase I with EFCL staff.

3.2 SUMMARY OF DATA ENTRY FLOW & PROCEDURE

3.2.1 Data readiness and accessibility

The interface should have:

- The main improvement we want in this interface is the move from unrelated forms and subforms to one drill down information window where all relevant information can be accessed and updated. An easy step by step walk through for data entry clerk to not miss any information or steps as outlined below.
- There will be some changes that are administrator only as indicated below – this can be done in the MSSQL back end
- Filter as you type features for selecting from existing related tables not just by beginning of entry but any location. For example if someone is typing Restorative Justice, the Mediation and Restorative Justice Society would be on the drop down list to select from.
- Alerts advise the problem / solution / next step

3.2.2 Lookups

- Contact Lookup is the best place to see all basic information – with drill down available into the Portfolio, Distribution, & FOIPP
- Facility Features should be renamed to Community League Features and expanded to include not only Facility Features but information available in the efcl_tCL table ie. Board election month, wards, etc.

3.2.3 Preparation for data entry alerts

- Check the corresponding league website for privacy information. If the information is on the league site and publicly available we can put it on ours. This information will go into the privacy form (linked to FOIPP tables)
- Be sure to check the year end on lists submitted and lists on the web. Double check with leagues if there is even a remote possibility they have accidentally sent an old list or haven't updated their website.

3.2.4 Filter for Contact updates

- When user is updating a league the option to filter by league which returns the latest incumbents of the board at the top of the list. (specified by efcl_tPortfolioMember.TermEndYr) This sort order should have prominent header information with the ability to click and sort by last name or portfolio / position.
- When updating all other contacts user can go direct to add contact
- Constraints should return an alert on first name, last name, and email if the contact is already in the database.

3.2.5 Add or Change Organizations

- If the Organization is not yet in the database, an add Organization button to open the organization subform for data entry should be available. Users may add but not delete organizations. It would be useful to show a filter as

you type of the existing entries in case the organization might be in under a slight variation.

- We constrain to not change an organization because we keep portfolio records of past board members – alert to this effect – contact the administrator to change organizations. The administrator should have edit privileges for the few instances where this is relevant.
- Some contacts have more than one organization through which they relate to EFCL. The community league is always the primary organization, however, some will have second organizations like the City of Edmonton, or Volunteer Edmonton. The field is already added to the efcl_tContact table as OrganizationID2 but not currently utilized.

3.2.6 **Update Existing Contacts –**

- Update fields of basic contact info, emails, address, telephone etc. for existing contacts.
- Click update to update the efcl_tContacts table

3.2.7 **Edit Portfolios**

- Drill down in a subform to edit portfolio for each individual. Edit term end year if re-elected to same position.
- Click an add portfolio button if they have a new position to create a new record in the efcl_tPortfolioMembers table and select appropriate portfolios and positions. Default term end year will be current year +1, however, some positions are longer thus the ability to edit is required.
- Portfolios are not deleted – if a board member quits the term end year is changed to the current year. Administrators should be able to delete Portfolios in obscure instances.

3.2.8 **Add Distribution**

- Add distribution - If distribution is blank, and there is an email, subscribe them to the newsletter by email by selecting the appropriate buttons.
- There is an option to receive by mail for those few who still request it.

3.2.9 **Privacy**

- Rename the existing FOIPP to privacy. Before you update be sure that the information is on their website as per point 1 or they have given permission to publish contact information on their list or in their email.
- If permission is blank, and we have permission, select the appropriate options.

3.2.10 **Privacy Constraints:**

- FOIPP you must have a portfolio and position attached to the person, and you must include at least first name, and both names, and then any additional approved information – telephone or email.

3.2.11 **New Contacts –**

- At the bottom of the filtered latest incumbents list, click a button to add new contacts
- Drill down subforms need to be available as above for portfolios, distribution, Privacy as per point 3.3.3.

3.2.12 Facility Features

- Table names will remain unchanged to prevent overhaul of existing code on the website.
- Facility Features will be renamed to Community League Features.
- Check if the Facility is in the Facility Features list yet – if not create facility.
- Check if the features are already added –If already added ignore and move to next feature.
- Select new features from drop down and add to the list be selection and button click.
- Standard users should be able to attach facility types to a league, add, delete, edit existing features that are attached to a facility type. Only administrators can create facility types and features to prevent overlap.

3.3 SUMMARY OF DATA STRUCTURE

3.3.1 Existing Data Entry Interface

We currently enter to our MSSQL database through an MS Access interface. Candidate who would like to see the forms and have sample data should email communications@efcl.org with intent to bid, and request the download information.

3.3.2 Contact Information

Each member elects a board annually. Often positions are vacant. Often positions are extended. More often than not we receive updated lists from our members late. We need to keep track of past and current positions. Only current information is posted on our league pages accessed from the league directory.

Contacts – [efcl_tContact] - straightforward contact information.

Organization – [efcl_tOrganization] - each individual is assigned an organization based on their primary relationship. There is a second organization field for many individuals that engage us in more than one capacity. (one contact to one or two organizations)

Groups – efcl_tContactGroup, efcl_tContactSubGroup - groups and subgroups sort contacts by relationship and function.

Departments & Branches – [efcl_tDepartment], [efcl_tBranch] - used only for government groups – [GroupID] = 5, 12, or 18

3.3.3 Member Information

Members are identified by [efcl_tContact].[ContactGroupID] = 2 and data entry of portfolios and positions is restricted to this default group. The members are also linked by [efcl_tOrganization.OrganizationID] to the [efcl_tCL] table. The only information in this table that they will

in the future be allowed to edit is [efcl_tCL] – [BoardElectionMonth]
[URL] and [HallURL]

Member Portfolios - [efcl_tPortfolioMember] - Details of the position occupied on the board are stored in this table.

Web Published Member Information - [efcl_tFOIPP] – tracks web publishing permission only (ignore other types). The following information is published to the web if FOIPP (freedom of information protection of privacy) permission is provided.

[efcl_tContact].[FirstName] or [FirstName] and [LastName],

[efcl_tPortfolio].[PortfolioDesc], [efcl_tPosition].[PositionTitle],
[efcl_tProgram].[ProgramDesc] from [efcl_tPortfolioMember],

[efcl_tContact].[PreferredEmail], and [efcl_tContact].[PreferredTel]

Publishing expires when the [efcl_tPortfolioMembers].[TermEndYr] and the [efcl_tCL].[BoardElectionMonth] is passed.

Distribution – [efcl_tDistribution] – Emails are subscribed or unsubscribed here.

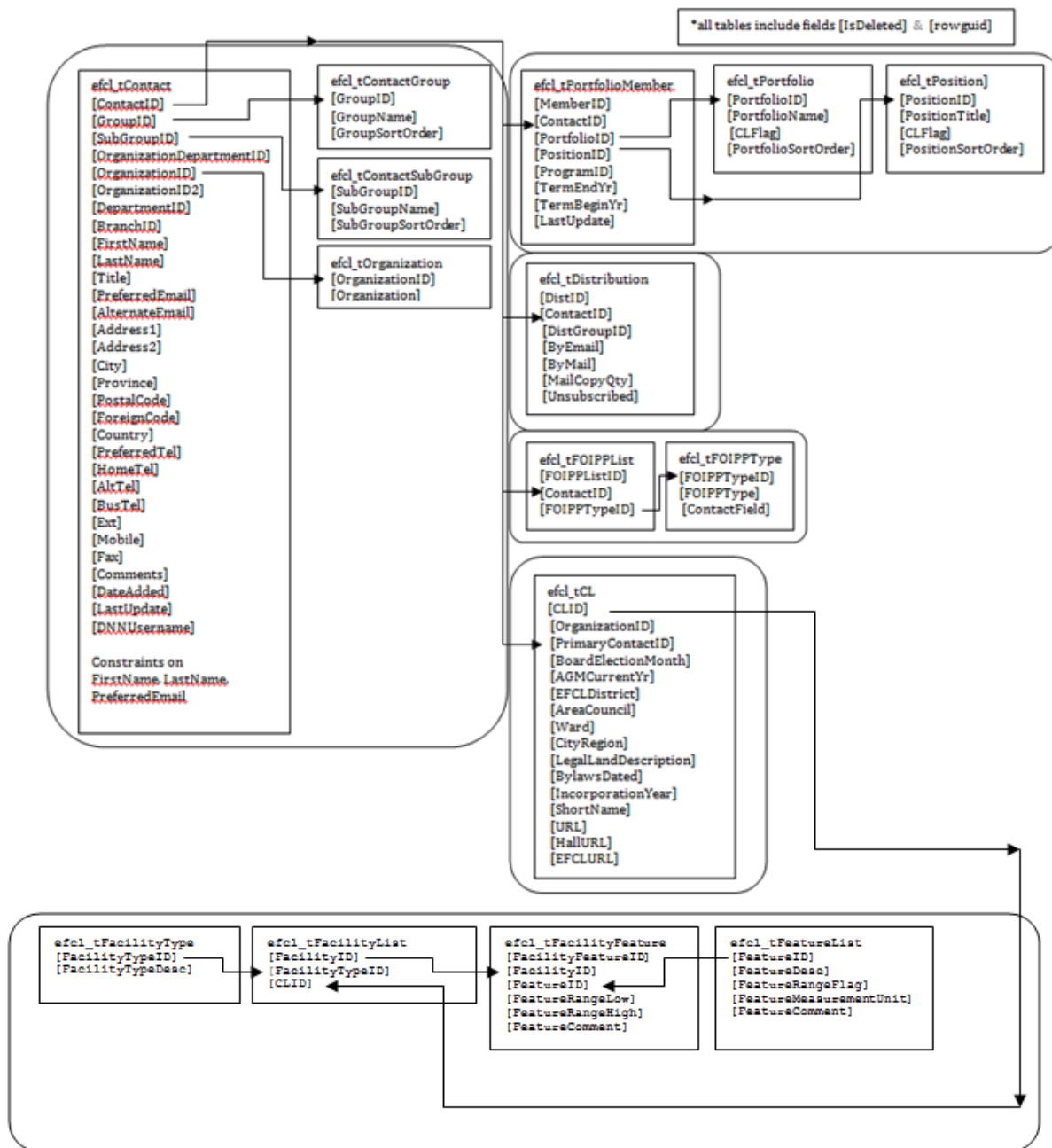
All other groups of contacts have their portfolio identified by title.

3.3.4 Facility Information

Members quite often develop their facilities and correct capacities and ranges as features are added or changed.

Web Published Member Facility Information – [efcl_tFacilityFeature] -
Relevant tables: [efcl_tFacilityType], [efcl_tFacilityList],
[efcl_tFeatureList]

3.3.5 Data Diagram of Primary Tables & Fields



3.4 TECHNOLOGY and REPORTING REQUIREMENTS

- 3.4.1 We are currently using Dot Net Nuke 6.01.02 as the application framework for our website. Familiarity with the application and module creation is not necessary although integration would prove beneficial, in which case coding fluency in dot net for aspx sites is desired.
- 3.4.2 Fluency in MSSQL is a must. We are using MS SQL, SQL Server 8.0, Windows Server 8.0.
- 3.4.3 The application is hosted through the Corymb Group and access to structure will be through their designated representative. Contact info on page 1. Access to the tables where will be given upon confirmation of proposal acceptance.

PROJECT 4: Email Conversion to Exchange / Offsite Data Backup

Deadline for submissions: February 3, 2012

DESCRIPTION: The EFCL recently switched to MDAemon however, is unsatisfied with its performance as compared to the previous service with Exchange. We want to switch back and are willing to entertain either of the two following options, or a third option if you have a better alternative:

- Hosting our email on the cloud, paying monthly subscription fee for utilization of Exchange online.
- Upgrade existing license for Exchange 2003 to 2010 and configure server.

We also are seeking offsite backup, ideally the cost of this would be combined with the Exchange hosting service.

BUDGET:

- Approximately \$1000-1500 for setup of mail server for 8 workstations, plus 1 additional email box accessed only online, Outlook PST backups and reinstalls, and uninstall of MDAemon.
- Annual cost of cloud hosting / backups \$400 – 1000 per year and / or Exchange software costs.
- Please provide in your quote the hourly rate for contract ongoing maintenance as required.

TERMS and CONDITIONS:

See General Terms and Conditions on page 1.

Please include a description of your complete IT / Network support and services, and rates. The candidate that performs well will become our ongoing IT support.

Relevant dates :

- Project questions accepted until January 25, 2012 – answers will be shared via email to all bidders by January 27, 2012
- Bid to be submitted by February 3, 2012
- Interviews to be conducted by February 11, 2012
- Bid to be accepted by February 17, 2012
- Implementation to commence immediately following acceptance
- Winning proposal should be available for debugging work station and server issues as needed – depends on the thoroughness of work station setup of Outlook.

4 Details – Project 4a: Email Conversion to Exchange / Offsite Backups

4.1 AUDIENCE

- 4.1.1 Exchange will serve EFCL's 6 full time staff, and 2 part time staff for a total of 8 work stations. We need one additional email for the president of our board that is accessed remotely. We will need the ability to increase our license for additional users. We need unlimited aliases.
- 4.1.2 Our staff is familiar with using Outlook with Exchange and prefers the data archiving and access to tools available through Exchange. The Outlook connector for our current product which was implemented in the fall lacks a few basic but integral tools.
- 4.1.3 Most of our staff is uncomfortable customizing their own Outlook settings. They will need assistance in configuring their Outlook the way they want it. They also are heavily dependent on their nickname files.

4.2 SUMMARY OF EXCHANGE

- 4.2.1 Either we pay annually or monthly for a licensed service on the cloud or implement an instance of Exchange locally.

4.3 SUMMARY OF CLOUD BACKUP

- 4.3.1 Currently we run weekly backups of new or changed files to memory sticks and store data offsite.
- 4.3.2 We want to automate this procedure by nightly backups on the cloud. We have approximately half a terabyte of data – up from 70 GB in 2008 – large part images, and the balance mostly documents.
- 4.3.3 Issues with the backups and restores will be managed by the successful bidder at an approved hourly rate.
- 4.3.4 Checks for integrity will be done on a set schedule as outlined in the submitted proposal.

4.4 TECHNOLOGY AND REPORTING REQUIREMENTS

- 4.4.1 We currently are using Windows Server 8.0.
- 4.4.2 Cloud hosting of Exchange requires no software. Local hosting will require the purchase of Exchange 2010.
- 4.4.3 Networking experience is essential.