



## **REQUEST FOR INFORMATION**

**Title: Intake and Workflow Management System for Marketing & Communications Projects**

**Reference No.: 1220-050-2024-010**

(General Services)  
Issue Date: March 28, 2024

## **1. INTRODUCTION**

### **1.1 Purpose of this Request For Information**

Through this request for information (the “RFI”), the City of Surrey (the “City”) is seeking responses from Respondents (the “Respondent”) to acquire a marketing specific project management system for its Corporate Marketing and Communications Division that can effectively handle the intake and workflow management of all marketing projects throughout their entire lifecycle – the scope is also commonly known as Intake and Workflow Management System for Marketing & Communications Projects to address problems (refer to Schedule A – Business Problem Statements for more detail). Our focus in this RFI is to consult the market and explore potential solutions to meet our Intake and Workflow Management for Marketing & Communications Projects to address problem requirements, including ideas and recommendations on strategy, scope, and approach.

Interested parties are invited to respond to this RFI by submitting a response (the “Response”) to the City. Responses should include ideas, information and recommendations that could result in a clarification of requirements, cost-savings opportunities, and the identification of potential problem areas with this initiative.

This RFI is intended to gather information that could assist the City in the development of a future procurement process, or processes (i.e., RFxs). In the event that sufficient information is received from this RFI, the City may, but is not obligated to, initiate a competitive procurement opportunity, or opportunities.

If a subsequent competitive procurement opportunity or opportunities are issued, the City is under no obligation to advise any Respondent responding to this RFI. Respondents are advised to monitor the City website and BC Bid website for any such opportunities, which will be open to all suppliers regardless of whether or not a response to this RFI has been submitted.

Respondents must not respond with any proprietary or confidential information as any information and/or recommendations in response to this RFI may be used by the City in determining the structure and content of any subsequent procurement opportunity, or opportunities. So please be careful not to send anything you might consider confidential.

The City reserves the right to invite additional responses from suppliers that did not respond to this RFI for any reason.

## **2. INSTRUCTIONS TO RESPONDENTS**

### **2.1 Address for Delivery**

A Response should be labelled with the Respondent’s name, RFI title and number. A Response should be submitted in the form as set out below.

The Respondent should submit a Response electronically in a single pdf file which must be delivered to the City by email at: [purchasing@surrey.ca](mailto:purchasing@surrey.ca)

PDF emailed Responses are preferred and the City will confirm receipt of emails. Note that the maximum file size the City can receive is 10Mb. If sending large email

attachments, Respondent's should phone [604-590-7274] to confirm receipt. A Respondent bears all risk that the City's computer equipment functions properly so that the City receives the Response.

## **2.2 Date**

The City would prefer to receive Responses on or before **April 25, 2024**.

## **2.3 Inquiries**

All inquiries related to this RFI should be directed in writing to the person named below (the "City Representative"). Information obtained from any person or source other than the City Representative may not be relied upon.

Name: Sunny Kaila, Manager, Procurement Services

E-mail: purchasing@surrey.ca

Reference: 1220-050-2024-010

## **2.4 No City Obligation**

This RFI is not a tender, request for proposals or a request for quotations and does not commit the City in any way to select a preferred Respondent or Respondents, or to proceed to negotiations for a Contract, or to award any Contract, and the City reserves the complete right to at any time reject all Responses, and to terminate this RFI process.

## **2.5 Respondent's Expenses**

Respondents are solely responsible for their own expenses in preparing and submitting Responses, and for any meetings, negotiations or discussions with the City or its representatives and consultants, relating to or arising from the RFI. The City and its representatives, agents, consultants and advisors will not be liable to any Respondent for any claims, whether for costs, expenses, losses or damages, or loss of anticipated profits, or for any other matter whatsoever, incurred by the Respondent in preparing and submitting a Response, or any other activity related to or arising out of this RFI.

## **2.6 No Contract**

By submitting a Response and participating in the process as outlined in this RFI, Respondents expressly agree that no contract of any kind is formed under or arises from this RFI.

## **2.7 Conflict of Interest**

A Respondent should disclose in its Response any actual or potential conflicts of interest and existing business relationships it may have with the City, its elected or appointed officials or employees. The City may rely on such disclosure.

## **2.8 Confidentiality**

All Responses become the property of the City and will not be returned to the Respondent. All Responses will be held in confidence by the City unless otherwise required by law. Respondents should be aware the City is a "public body" defined by and subject to the *Freedom of Information and Protection of Privacy Act* of British Columbia.

## **3. RESPONSE FORM AND CONTENTS**

### **3.1 Response Content**

There is no Response form to fill out. Respondents should provide a concise and focused written response to the following items in the order listed:

- (a) a brief Respondent profile;
- (b) include a document that explains how Respondent's goods and/or services can be used to address the business problem statement(s) listed in Schedule A – Business Problem Statements;
- (c) include ideas, information and recommendations that could result in clarification of requirements;
- (d) identification and discussion of potential problem areas with this initiative, including cost savings opportunities that the Respondent recommends the City consider when establishing its future business requirements;
- (e) relevance of solution – demonstrations of successful projects, case studies and best practices with other service organizations;
- (f) high level cost estimate(s), for budgeting purposes only;
- (g) any other information specific to the nature of this RFI and deemed important by the Respondent; and
- (h) any other information specific to the nature of this RFI and deemed important by the Respondent.

Respondents are specifically requested not to submit detailed price proposals (other than high-level cost estimates for budget purposes noted in item (f) above) or provide information about the experience or qualifications of their company or individuals in their company.

Respondents to this RFI consent to the City incorporating any submitted ideas, concepts, approaches, or strategies into any planning, design, procurement, or contractual activities related to any aspect of the project without any obligation, liability, or consideration on the part of the City.

This RFI will not be used to evaluate, rank or select suppliers, nor will it be used to pre-qualify or screen Respondents for a subsequent competitive procurement opportunity, if any.

### **3.2 Cost Estimates (High-Level)**

Any cost estimates provided are for budgeting purposes only. Respondents will not be held to price estimates provided as part of the RFI should the City later decide to issue a competitive solicitation.

### **3.3 Additional Information**

The City may, at its discretion, request clarifications or additional information from a Respondent with respect to any Response and the City may make such requests to only selected Respondents.

### **3.4 Interviews**

The City may, at its discretion, invite some or all the Respondents to appear before the City to provide clarifications of their Response. Note: The City reserves the right to arrange for a follow-up meeting with any Respondent whose initial presentation was sufficiently informative and indicative of more to be learned. If this provision is exercised, it is NOT to be interpreted as a short-list of preferred Respondents, rather as an opportunity for City staff to better understand a particular response.

We appreciate your time and your help with our information-gathering, and we look forward to hearing from you.

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## SCHEDULE A – BUSINESS PROBLEM STATEMENTS

### PROJECT TITLE: INTAKE AND WORKFLOW MANAGEMENT SYSTEM FOR MARKETING & COMMUNICATIONS PROJECTS

#### 1. INTRODUCTION

The following business problem statements encapsulate the information management problems faced by the City, to which Responses to this RFI should be directed.

The City is looking to acquire a marketing specific project management system for its Corporate Marketing and Communications Division (CMCD) that can effectively handle the intake and workflow management of all marketing projects throughout their entire lifecycle. The vision is to have a system that streamlines the process, providing a one-stop shop that systematically prioritizes and processes all requests within one platform including their respective workflow, scope, prioritization, timeline, and billing.

#### 2. BACKGROUND

##### Current State

The City's CMCD provides marketing, web, and communication services to all City business units that require strategic counsel and support in communicating with external audiences and stakeholders. They currently use separate tools to manage the client request intake process, workflow management, and the allocation of staff resources. There is a need to replace these tools with a system that can manage all aspects of the process more effectively.

##### Preferred Future State

The below breakdown provides a high-level overview of the desired functionalities for this system. This is, by no means an exhaustive list, rather a representation of some of the current needs of the City.

##### **Project Intake**

- A project intake form that is sufficiently clear, enabling customers to independently complete and submit their requests.
- Ability for system users to configure and make updates to the submission form.
- Ability for system users to group requests together.

##### **Project Tracking & Reporting**

- Ability for system users to track the status of a project throughout its lifecycle with indication to whom the project and/or project tasks are assigned to.
- Ability for system users to trace the history of a project, identifying who was assigned at its various stages and any changes made during the process.
- Ability for system users to receive notification when a project or project task is assigned to them.
- Ability for system users to pull reports from the captured data to identify individual project statistics (ex. project start/end dates, estimated hours vs. total hours worked, costs, etc.).

- Ability for system users to pull reports from the captured data to identify overall project statistics (ex. total number of digital projects completed in year, number of requests by department, etc.).
- The system should offer a singular, dependable source of information to be used for tracking and reporting purposes.
- Projects should each be assigned a unique project identifier.

#### **Customer Relationship Management**

- Ability for the customer to identify the status of their project and who it is assigned to.
- Ability for the customer to be provided with automatic notifications when there are changes to the project status.

#### **User Interface**

- Ability for system users to have access to a clear and comprehensive layout that displays all project details.
- The system should possess logic capable of automatically generating project tasks tailored to the specific type of project.
- Ability for system users to edit project or task details and include additional instructions as needed.

#### **Integrations**

- Interested in any integrations with resource management components/systems.
- Interested in any integrations with Microsoft Active Directory.

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