Request for Proposals
Bat Program Database Development

15 February 2024

PROPOSAL DEADLINE: Tuesday, 16 April 2024 by 5pm EST
PROPOSALS DELIVERED TO: WCS Wildlife Conservation Society Canada

1.0   Project Background

Wildlife Conservation Society Canada's (WCS Canada) mission is to save wildlife and wild places in Canada through science, conservation action, and by inspiring people to value nature. WCS Canada was established as a Canadian Charity in July 2004 and is registered with Industry Canada as a not-for-profit corporation.

The Western Canada Bat Conservation Program (Bat Program), a program of Wildlife Conservation Society Canada, has been operational since 2011. We are committed to protecting bats and bat habitat in Western North America by conducting research that fills knowledge gaps, disseminating our findings, and working with government and the public to influence conservation efforts. Since 2011 the research data collected have been managed using a variety of Microsoft Excel worksheets. This approach to data collection and management is now limiting our ability to update, extract, and exercise the data we have spent years collecting.

WCS Canada is requesting proposals from qualified entities to design and implement a relational database with a variety of functionality, including data upload, standard filters for data extraction, and a user-friendly data reporting interface for developing custom reports.

2.0   General

Data to be included in the database date back to the early 2000s. Currently, there is approximately 400 MB of data to be imported, housed in various Microsoft Excel spreadsheets. Data will be grouped by data category with each data category encompassing some shared (e.g., site name, survey sample identification), but primarily different data fields. We are looking for a relational database to link the shared data fields and house all current and future data. Data will also need to be queried from the database to generate outputs for reports and publications, and to share with research partners, and government agencies. Main data categories include:
- **Capture data** – This dataset includes data collected during bat capture surveys (e.g., survey site name, location, date), species data (e.g., species identification, sex, age), samples collected (e.g., bat feces, hair, tissue), where samples are currently stored, and any lab analyses conducted.
- **Structure data** – This dataset includes data about bat roost types (e.g., bridge, wildlife tree, BrandenBark), associated survey samples (i.e., bat feces) collected, where samples are currently stored, and any lab analyses conducted.
- **Bat acoustic data** – This dataset includes data about the acoustic survey date, site information, and analyses of recordings collected.

Further information about the different data fields, separated by data categories, can be found here: https://www.wcscanada.org/Portals/96/RFP_bat_data_types.xlsx

3.0   Submission Guidelines

All requests for clarification and questions concerning this RFP must be submitted in writing no later than 2 April 2024 via email to Gillian Woolmer, Director of Finance and Operations gwoolmer@wcs.org **and** Erin Low, Program Coordinator – Western Canada Bat Conservation Program elow@wcs.org (and indicate "Bat Program Database Development RFP" on the subject line). Responses, if determined appropriate by WCS Canada, will be issued in writing to all known proposers.

Proposals, plus attachments, exhibits or appendices are to be submitted in e-form to:

-     Gillian Woolmer, Director of Finance and Operations, gwoolmer@wcs.org **and**
-     Erin Low, Program Coordinator – Western Canada Bat Conservation Program, elow@wcs.org

WCS Canada may request an interview of any proposer, and proposer's key staff should be present at the interview. Such a request for an interview does not constitute an awarded contract.

Proposals must be received no later than **5:00 PM EST, 16 April, 2024**

Key Dates:
Last day to submit questions	2 April 2024
Proposals due	16 April 2024
Interviews of proposers	May 2024
Notice of Award	by end of May 2024

4.0   Scope of Services and Desired Qualifications

It is anticipated that this project will take place in up to three phases based on the priority of database functionality. The proposer should outline the proposed phases and provide an estimated cost for each phase.

The table below is an attempt to outline the desired database functionality in three parts; Database Design and Structure, Data Import and Interface, Data Extraction and Reporting. In addition, functionality has been identified as either a "base requirement" (i.e., necessary function in final database or "must have") and "requested add-on" (i.e., function not required in the final database but would be "nice to have"). The priorities have been identified as 1 (top priority for completion) through 3 (lowest priority).

Definitions:
- *Data category* – Main groupings of data (e.g., CAPTURE DATA, STRUCTURE, ACOUSTICS - ANALYSIS, ACOUSTICS - STATIONARY SITE, ACOUSTICS - MOBILE COVARIATES).
- *Data field* – The attributes that will be displayed as a column header in the developed

database (e.g., Bat ID number, site name, GRTS ID).

- *Load form* – Due to the breadth of data and changes in what information is collected between years, there are many different data fields collected for each data category. However, not all data fields are required for all data entries. Pre-defined data entry templates (i.e., *load forms*) will contain only the most commonly required data fields (e.g., CAPTURE DATA - GENERAL, CAPTURE DATA - PIT tag, STRUCTURE - TERM, STRUCTURE - BRIDGE).

Database feature	Database functions	Base requirement or requested add-on	Proposed phase
1. Database Design and Structure	a) Create an online/cloud-based relational database to house all current and projected data that can link the data based on shared data fields.	Base requirement	1
	b) Database has user log-in/password protection, with various levels of access depending on credentials. • WCS Canada staff can edit with various degrees of access depending on level needed. • Outside partners/contractors can view only. Changes in who can access the database (e.g., view and/or edit) can be easily adjusted by administrator level users.	Base requirement	1
	c) Users must be able to update the database model independently and swiftly (e.g., add/remove/edit data categories, data fields, and load forms). No coding knowledge would be required of the user.	Base requirement	1
	d) Ability to access a prior version of the database in the event of unauthorized data changes.	Base requirement	2
	e) Ability to access the full database when working offline.	Requested add-on	3
2. Data Import and Interfac	a) Data can be entered: i. Directly through the database interface. Database has a 'Microsoft Excel' type interface where data fields are displayed as columns with each row	Base requirement	1

Database feature	Database functions	Base requirement or requested add-on	Proposed phase
e	representing a different entry. ii. Via a data import feature to load data collected using Excel templates. Ideally with the ability to load multiple files at one time. Detailed error report produced when an upload fails.		
	b) Data restrictions/input validation (e.g., restrictions on entry values, require selection from pre-defined drop-down entries) designed to prevent data entry errors for both imported data and manually entered data. Database will generate a message identifying where the entry error(s) are. Tested with samples of clean historical data loaded into the database.	Base requirement	1
	c) Additional data restrictions/input validation designed to limit options that can be entered into one data field based on the value of an earlier data field (e.g., if "Sex" is identified as "Female", only female reproductive conditions are present in the "Repro Condition" drop-down list).	Base requirement	2
	d) Load forms can be exported as a blank form that includes data validation rules for data collection outside the database.	Requested add-on	3
	e) Database automatically populates related information into the data fields when a new entry is created (e.g., if a load form that has a 'bat identification number' and the site name of where the bat was captured has previously been submitted, then if that 'bat identification number' is ever entered again the site name data field will automatically populate with the correct site name).	Base requirement	2
	f) Shortcuts are available to assist with rapid data entry (e.g., same entry as last record).	Base requirement	2
	g) User should be able to start a data entry form, save progress, and return later to complete.	Base requirement	2

Database feature	Database functions	Base requirement or requested add-on	Proposed phase
	h) Entered data can be updated easily and there is the ability for bulk editing multiple records at a time (e.g., upload lab results once available and associated with locations, individual bats).	Base requirement	2
	i) Load forms (both for manual entry and blank exported forms) are fully customizable. Users must be able to easily (i.e., no coding knowledge is required): • Create and save new load form templates. • Add new data fields to selected load forms either permanently or just for the selected data submission. This could include other data fields that exist in the database but are not currently included in the pre-defined load form. Or users can create and define an entirely new data field with data restrictions/input validation. • Remove data fields from the selected load form either permanently or just for the selected data submission. • Edit existing data fields (e.g., change data field name, create/add/remove additional drop-down options).	Base requirement	2
	j) New data categories can be created easily (i.e., no coding knowledge is required). Users can then create load form(s) specific to the data categories.	Base requirement	2
	k) A written description of what the data are appear when users hover over a data field.	Requested-add on	3
3. Data Extraction and Reporting	a) Data can be queried easily – no coding knowledge is required to build a query. Queries can include any combination of data fields (e.g., AND, OR, >, <). Users can also download data in the same structure as the pre-defined load forms for a given project, while also being able to add/remove data fields as needed. Common queries include species, project name by year, date, location, etc.	Base requirement	1

Database feature	Database functions	Base requirement or requested add-on	Proposed phase
	b) Data generated from queries can be downloaded in xlsx/csv format.	Base requirement	1
	c) Data can be queried by map location. All spatial/location data are point data only (i.e., no lines or polygons). Two options are listed in decreasing order of preference. i. Queried data are displayed on a built-in map interface. Data can be interacted with, hyperlinked back to the original data tables. The user can query all data with geographic coordinates that fall within a defined area (e.g., within the location boundaries of a given granting agency, within a watershed) ii. The user can query all data with geographic coordinates that fall within a defined area. However, this information is displayed in table format only. A separate script is then able to pull these location data into an application such as Google Earth or ArcGIS Pro.	Requested add-on	3
	d) Queried data can be summarized for a given dataset (e.g., COUNT, MEAN, RANGE, MAX).	Requested add-on	3
	e) Queried data can be generated in a specific output format (e.g., government required templates). A government template example can be found here: https://www2.gov.bc.ca/assets/download/F9EC365B29A045D6A0C456FC02448A48	Requested add-on	3

Additional Requirements:
- Provide assistance with data normalization across the different data categories
- Database can house all current and future data (currently ~400 MB of data to be imported)
  - No large files (e.g., acoustic files, photos) will be housed directly in the database, rather hyperlinks to where these data files are stored online will be provided
- Preference for an open-source database, or software with reasonable annual subscription costs
- Be available throughout the project period to provide advice and guidance on the database development and related issues
- Post-development, provide a summary report containing comments on the current state

of the database and recommendations for improvement and further development
- Provide coded script for database, annotated as appropriate
- Provide a basic user manual
- Additional services, upon request and as needed

Project Timeline
- June 2024 - Framework conceptualized and detailed phases defined
    - Database model (i.e., choosing what the different tables in the database are, what they are called, what they represent, the fields they contain, and how they relate to other tables) has been provided for input in the form of a database diagram or other schematic
- December 2024 or earlier - Initial build complete and sample of historical data imported
    - Phase 1 is complete, phases 2 and 3 may still be in progress
- March 2025 or earlier - Full functionality incorporated and fully operational

The selected proposer is expected to have the following qualifications:
- Experienced database developer with appropriate qualifications and demonstrated experience to complete this project;
- Have experience in developing databases for biological data is a benefit;
- Not be a member, or a relative or business associate of any member, of the WCS Canada staff or Board of Directors; and
- Be familiar with WCS Canada's mission and programmatic activities.

5.0   Length of Engagement

WCS Canada has donor reporting requirement as of 31 March 2025.

6.0   Proposal Content

Proposals should be clear and concise, and should address in detail and with appropriate documentation each of the items listed below. Proposals that fail to do so may be disqualified as non-responsive. WCS Canada may request clarification of any proposal during the evaluation process, but it is not bound to do so, and proposers should not assume they will have any further opportunity to clarify their proposals subsequent to the proposal due date.

Each proposer is requested to submit, on or before the submission deadline, a pdf containing its proposal addressing the following items in the order listed:

A. Technical Qualifications
     1. Contact Information

     On a single cover sheet, please provide:

     1. The proposer's name.
     2. The proposer's contact person.

3. Contact information for the principal(s) or lead individual(s) who are anticipated to work on the project, including e-mail addresses, main telephone, fax and mobile telephone numbers.
4. Street address and web address of proposer.
5. Year proposer was established.
6. Size of proposer.
7. List of proposed staff assigned to this project.
8. Signature of Principal and date of the signature.

2. Overview

Proposers should provide a summary of their understanding of the objectives of this RFP and a description of the methods they will use to achieve those objectives, including technical quality assurance, and general management practices for comparable projects.

3. Qualifications

Proposers are requested to provide detailed information that demonstrates the following:
* experience providing the services requested in this RFP;
* proficiency with projects of comparable size and complexity;
* expertise of key staff in relevant professional disciplines;
* demonstrable commitment to diversity and inclusion of staff and subcontractors.

4. Staffing Plan

Proposers should list the principals and key employees who will carry out the work, including their experience with same, identifying the proposed project manager and staff members. A resume of each key member of the project team should also be included, indicating that member's responsibilities for the project and relevant experience. Upon award of the contract, substitutions of personnel will not be allowed without the prior written consent of WCS Canada.

5. Timetable/Schedule

Proposers should produce a draft schedule that outlines critical milestones for the work.

6. Project Approach

Proposers should clearly break the project into phases:

* explain how the proposed database model will allow users to independently and swiftly add/remove/edit the data categories, data fields, and load forms after the contract has ended

- identify any potential challenges or concerns that may arise throughout the development of the database and outline possible mitigation strategies to overcome them
- identify, using the "Database feature" (i.e., 1 – 3) and "Database functions" (i.e., a – l) columns what is included in the "Base development fee/deliverable or component" and what is considered in "Additional fees" and "Other services".

7. References

Proposers are requested to provide examples of up to three (3) similar projects, recently completed or in progress, with the following information for each:

- Client
- Description of the work
- Name of a contact person who can provide a reference.

References may be contacted directly by WCS Canada.

B. <u>Fee Proposal</u>

A project fee structure should clearly break work out into the proposed phases in Canadian Dollars, referencing the table on pgs 4-7. Provide a breakdown of how costs were determined.

Provide information regarding how any requested additional services will be charged (e.g., personnel with titles and hourly or per diem rates).

C. <u>Preliminary List of Subconsultants</u>

Insert, if applicable to project.

7.0   General Conditions of Proposal Submissions

The following general conditions apply to all proposals submitted in response to any RFP issued by WCS and WCS Canada (collectively referred to below as ("WCS Canada"):

- Non-Binding:
  WCS Canada's solicitation of proposals in response to any RFP does not commit WCS Canada to award a contract, and this RFP is not an offer to enter into a contract for the services to be provided as described herein.
- Proposal Materials and Costs:

WCS Canada is not liable for any costs incurred in the preparation, submission or negotiation of a response to its RFP or incurred for any other purpose or reason in connection with the RFP. No materials submitted with this RFP will be returned.

- Confidentiality:
All information and material contained in any WCS Canada RFP or issued by WCS Canada or any of its agents as part of any WCS Canada RFP process is confidential and is the exclusive property of WCS Canada.

- Modifications:
As a condition of award, WCS Canada may request any proposer to make revisions, additions, or deletions to its proposal.

- Subcontractors:
After award of contract, WCS Canada will have no obligation, financial or otherwise, to any subcontractor of the awardee. Nevertheless, any subcontract will be required to be subject to and consistent with the prime contract between WCS Canada and the awardee, and WCS Canada may require any subcontract to include specific terms and conditions.

- Reserved Rights:
WCS Canada at any time in its sole discretion may, without notice and without liability to any proposer or any other party for their expenses incurred in the preparation of the responses hereto or otherwise, do any and all of the following:
  o Amend or withdraw this RFP;
  o Accept or reject any and all proposals received in response to this RFP;
  o Award the contract to a proposer other than the proposer offering the lowest fee;
  o Request additional materials and clarification or modification of any submitted proposal;
  o Extend the time for submission of all proposals after notification to all prospective proposers;
  o Terminate negotiations with a selected praudoposer and select another proposer;
  o Take such action as WCS Canada deems appropriate if negotiations fail to result in a signed agreement within a reasonable amount of time; and/or
  o Terminate or modify the solicitation and selection process at any time and re-issue the solicitation to whomever WCS Canada deems appropriate.

The selected vendor will be required to execute a written agreement with WCS Canada, including terms generally consistent with those set forth in Appendix A hereto, effective upon the date the written agreement is executed by both WCS Canada and the selected vendor.

8.0   Evaluation and Selection Criteria

Selection Process:

- WCS Canada will review and evaluate all proposals to determine each proposer's rating. This evaluation may include a request to interview proposers and for proposers to virtually present their proposals for purposes of clarification.
- The proposal offering the most advantageous terms based on the criteria below will be selected for the award. WCS Canada may reject any and all proposals if, in its sole opinion, no proposal satisfies its criteria.

Evaluation Criteria:

The evaluation criteria and weight will be as follows:

- The vendor's technical capability to provide the services (25%);
- Project related experience of the proposed staff (20%);
- Client references (10%);
- Commitment to diversity and inclusion of staff and subcontractors (5%);
- Proposed fee (40%).

APPENDIX A

1. CONTRACT, INSURANCE, AND REGULATORY REQUIREMENTS

2. **Payment**

Contractor will submit invoices for its work, in a form acceptable to WCS Canada, to its contact for review, who will submit the invoices for payment. Payment is subject to acceptance of the services. Contractor will be paid without deductions for income taxes or other sums which employers in Canada are required to deduct from employee's wages. Even though income tax and other deductions are not made by WCS Canada, Contractor should be aware that WCS Canada may be obligated by Canadian regulations to report to Canada Revenue Agency total annual amounts paid to Contractor. Contractor will be solely responsible for the payment of all withholding and other taxes, of whatever type or nature, arising out of or related to its engagement under this Agreement and agrees to and hereby does indemnify and defend WCS Canada and its directors, officers, employees, independent contractors and agents against any claim relating to such taxes. WCS Canada will pay approved fees and expenses within thirty days after receipt of acceptable documentation.

3. **Relationship of the Parties**

Contractor's relationship to WCS Canada under this Agreement is that of an independent contractor. Nothing in this Agreement will be deemed to constitute a relationship of employer-employee, joint venture, partnership, agency, or legal representative between Contractor and WCS Canada for any purpose. Neither Contractor nor any of its employees, independent contractors or agents will receive the health insurance, sick leave, vacation, pension, retirement savings plan or other fringe benefits, or severance or termination pay, associated with regular employment at WCS Canada.

4. **Termination**

Either party may terminate this Agreement without cause by furnishing at least 30 days' written notice to the other. In such event, Contractor will be paid only for services actually rendered to the date of termination. With reasonable cause, either party may terminate this Agreement immediately upon written notice to the other. Contractor shall not incur any additional expenses between the date of notice of termination and the date of termination without the prior written consent of WCS Canada.

5. **Confidentiality**

Contractor warrants that it will maintain in strict confidence WCS Canada's Confidential Information (as defined below) to which it has access during the term of this Agreement. Contractor will treat WCS Canada's Confidential Information with the same standard of care that it uses in maintaining its own Confidential Information, provided that that standard is not negligent. Contractor will use WCS Canada's Confidential Information only as is required by this Agreement, and will not reveal it to a third party without the prior written consent of WCS Canada, or unless it is required by law to reveal it.

"Confidential Information" means information concerning each party's affairs, activities, research, proposals, projects, finances, property or method(s) of operation, trade secrets, know-how and similar information. Confidential Information does not include information which (a) is already known through lawful means to the receiving party before the other party's disclosure, (b) after disclosure, becomes generally known to the public through no breach or fault of the receiving party, (c) a party receives from a third party who is free to make such disclosure without breaching any legal obligation to the disclosing party under this Agreement, (d) the receiving party develops independently as evidenced by its own written records, or (e) is required to be disclosed by judicial or administrative process, in which case the party required to make that disclosure will notify the other of the obligation and cooperate reasonably with that party's effort to bar or seek a modification of the order.

The term "Contractor" for purposes of this section shall include Contractor, its subsidiaries and affiliates, and their respective current and former partners, directors, officers, employees, independent contractors, representatives and agents.

6. Warranty

Contractor warrants that it will perform services hereunder in good faith with qualified personnel in a competent and workmanlike manner in accordance with applicable industry standards.

7. No Assignment

The Agreement may not be assigned by Contractor without the prior written agreement of WCS Canada, and any purported assignment made in violation of this prohibition will be null and void.

8. No Consequential Damages

IN NO EVENT SHALL WCS CANADA BE LIABLE OR RESPONSIBLE TO THE CONTRACTOR FOR INDIRECT, SPECIAL, INCIDENTAL, PUNITIVE OR CONSEQUENTIAL DAMAGES, OR DAMAGES FOR LOST PROFITS OR LOST SAVINGS, EVEN IF THE CONTRACTOR IS INFORMED OF THEIR POSSIBILITY.

9. Insurance

For the entire term of the Agreement and at any time Contractor is providing services to WCS Canada, Contractor shall obtain and maintain insurance as described and in amounts not less than those set forth below, covering Contractor's operations and those of any subcontractors, sub-subcontractors, suppliers, or any of their agents, employees, officers, directors or partners, in connection with the services provided :

Contractor must furnish proof of insurance reflecting required coverages upon execution of the Agreement and before the performance of services.

- Public/Third Party General Liability
    Minimum Limits:
    $ 1,000,000 per occurrence
    $ 2,000,000 aggregate

- Excess/Umbrella Liability
    Minimum Limits:
    $ 2,000,000 per occurrence
    $ 5,000,000 aggregate

- Worker's Compensation/Employer's Liability (or equivalent insurance covering employees injured in the course of employment duties)
    Limits- Statutory Limits
    Employer Liability Limits:
    $ 1,000,000 – each accident
    $ 1,000,000 disease – policy limit
    $ 1,000,000 disease – each employee

- Professional Liability (Errors & Omissions)
    Limits: $1,000,000 per claim

- Additional Requirements:
    o   All policies will include a waiver of subrogation for the benefit of WCS Canada.

- o WCS Canada will be included as an Additional Insured under the General Liability and Excess Liability policies (unless any such coverage is not required).
- o Contractor's policies shall be primary, and any insurance maintained by WCS Canada is excess and noncontributory.
- o Contractor specifically agrees to provide WCS Canada at least 30 days' notice of any termination, cancellation or material modification of any of the above insurance policies.

10. Force Majeure

Neither party shall be in breach of this Agreement if its performance is materially and adversely affected by acts of government, civil unrest, terrorism, riots, military actions, border closures, labor disputes, major infrastructure disruptions, environmental disasters, extreme natural phenomena, public health crises or other causes beyond the reasonable control and without the negligence or fault of the non-performing party (each, an "Event of Force Majeure"). The non-performing party shall give prompt written notice thereof to the other party, including a description of the Event of Force Majeure. For the duration of the Event of Force Majeure, the affected requirements of this Agreement shall be suspended; provided, however, that the non-performing party shall use reasonable efforts to mitigate the effect of the Event of Force Majeure on its performance under this Agreement. After the Event of Force Majeure, the parties shall resume performance as soon as reasonably practicable, unless they agree otherwise in writing. If an Event of Force Majeure lasts over 30 consecutive days or severely undermines the primary purpose for entering into this Agreement, either party may terminate this Agreement without penalty by written notice to the other. In the event of such a termination, payment will be made for services satisfactorily performed and goods delivered and accepted. To the extent any deposit has been paid in advance in respect of services that have not yet been satisfactorily performed or goods that have not yet been delivered and accepted, such deposit shall, upon written agreement of the parties, be retained as a credit toward future services or goods or, failing such agreement of the parties, refunded in full within 30 days of the termination.

Additional note regarding Agreement terms and conditions:

WCS Canada will not enter into an Agreement for services in which WCS Canada indemnifies Contractor for claims arising out of Contractor's performance of professional services.