

April 16th, 2019

Project Overview and Statement of Work – GATEWAY Business Plan

Overview

CADSI is a highly reputable and well recognized member-based organization (900+ corporate members) representing the Canadian defence and security industries at home and internationally. Defence and security industries are an essential and driving force in Canada's economy, generating \$10B (CDN) from industry revenues annually while employing roughly 60,000 Canadians.

GATEWAY by CADSI is a suite of business tools designed to help companies excel, allowing them to crawl, walk, then run by connecting the dots between different business tools and processes. GATEWAY will be featured within CADSI's free member portal, called myCADSI. myCADSI, accessed through CADSI's website – www.defenceandsecurity.ca – or directly at mycadsi.ca, is the portal for CADSI's over 900 + corporate member companies, as well as government stakeholders and non-members within the defence and security industry. It is where employees of these companies and organizations manage their corporate profiles, follow their events and invoices, and access relevant member and industry information (Post-Event Resource Library, e-newsletters, business development tools, etc.).

GATEWAY is a long-term investment for CADSI, with the goal of launching new business development tools and features throughout 2019 and for years to come. It is an evolving platform that provides professional services for members and non-members alike. As is CADSI's focus in all its ventures, GATEWAY is meant to be an innovative value-driven platform.

The tools that have or will launch in 2019-2020 for GATEWAY are as follows:

- GATEWAYintel: This is a curated market intelligence tool that offers members information about foreign defence markets. This tool launched in February 2019 with information on 35 countries.
- GATEWAYacademy: This is our new eLearning tool meant to provide insights and information to help our members grow their business through expert advice about entering the defence supply chain, exporting to foreign markets, growing their business opportunities, etc. This tool will launch on May 1st with the first course tailored to small and medium enterprises.
- GATEWAYcapabilities: This is a database of Canadian companies that highlights their key capabilities in the defence sector as well as key industrial capabilities as defined by the government. Companies will use this tool to showcase themselves to potential OEMs/Primes/large companies if they are SMEs looking to enter the supply chain, or to government/procurement reps if they are large companies. This tool was launched on April 2nd, 2019.
- GATEWAYignite: This tool allows companies to search for and find procurement opportunities in foreign markets and also identify necessary contacts in these markets. This tool will launch in the first quarter of 2020.
- GATEWAYjobs: This is a job listing tool where member companies can list their employment opportunities and individuals can apply to those postings.

Purpose

CADSI desires to create a business plan for the new GATEWAY suite of business development tools in order to:

- 1) develop a free versus paid services model,
- 2) determine a pricing structure for these paid services,
- 3) plan launch messaging for this new business model,
- 4) estimate potential users and growth over next 5 years, and
- 5) define what success looks like within this new model.
- 6) Define revenue estimates

In this regard, the Proponent will be responsible for the development of the business plan for the free and paid services of GATEWAY on myCADSI.

Target Audience

GATEWAY will only be accessible through the myCADSI platform. This means that employees of CADSI's 900+ member companies, government stakeholders and non-member companies (a total of 83,000 users) may potentially access the portal at some point during the year. Currently, about 79% of these accounts appear to be active with 58% having updated their myCADSI accounts since launch.

CADSI members are comprised of companies of all sizes and compositions, from small and medium businesses (SMEs – comprising roughly 90% of our membership) to larger prime companies (Primes or OEMs), and also includes associations and educational institutions, media, and international companies that operate in Canada, all of whom are working for the good of Canada's defence and security industries.

Non-members who are also a key target audience for CADSI consist of government stakeholders, and companies within the defence and security industry that have not purchased membership. At the same time, CADSI is now actively moving beyond our classic defence target audience (in Canada or abroad) to recruit companies who sit on the edges of the defence industry, working in robotics, training & simulation, cyber defence, engineering, advanced manufacturing, advanced infrastructure, artificial intelligence, autonomous vehicles, cutting edge technologies, etc.

Each of these audiences (members, non-members, media and government stakeholders) have different levels of access to the tools within myCADSI and thus GATEWAY.

Statement of Work (SOW)

CADSI is seeking proposals from established, qualified and experienced service partners that will address the following Statement of Work (SOW). This SOW is intended to be suggestive in nature and is not necessarily intended to be exhaustive nor prescriptive in order to allow for project flexibility and foster an innovative approach. However, as a guideline, please refer to the below section outlining basic objectives and outcomes, which are open for discussion.

CADSI recommends that this project and resulting outcomes/report contemplate, address and respond to the following:

- 1) Identify similar business development platforms and free versus paid business models
 - What platforms are competitors?
 - Identify benchmarks and best practices. What makes them successful
 - What is the messaging that is used here?
 - Identify failures and what makes them fail
- 2) Determine the monetary value of the GATEWAY suite of tools
 - What is the value of GATEWAY as one complete package?
 - Is this one package? Multiple themed packages (such as ‘Doing Business Abroad Package’, ‘Education Package’, etc)? Individual tools offered independently? Discounts for more than two/three tools? etc.
 - What is the value of these individual business development tools presented under the GATEWAY umbrella?
 - GATEWAYintel
 - GATEWAYacademy
 - GATEWAYcapabilities
 - GATEWAYignite
 - GATEWAYjobs
- 3) Define “Freemium” (free) and “Premium” (paid) offerings
 - Drill down into the individual business development tools housed under the GATEWAY brand to identify which features within each should be paid services
 - Determine what a “Freemium” offer looks like
 - Identify whether this should be a part of CADSI membership benefits or available to non-members as well as an enticement to try the tool
 - Identify target audiences for these offers
 - Who receives a “Freemium” offering?
 - Who is allowed to purchase a “Premium” offering?
- 4) Define messaging surrounding launch of this new free versus paid business model
 - As business development tools within CADSI have traditionally followed a “free with membership” model, what would be the messaging for a paid model? How would this message aid in minimizing negative perceptions?
 - Planning for onboarding process to launch new business model

- How to differentiate Gateway services from membership
- 5) Determine what is the measure of success for this business model
- Estimate the number of users that can be expected in the initial launch phase for GATEWAY and its individual tools
 - What numbers would mean success? Failure?
 - Estimate the percentage growth over the short, medium, and long term and the range that would mean success or failure
 - Define other analytics to be used to measure GATEWAY going forward
 - Where should CADSI market and advertise to reach desired target audience?
 - Estimated advertising budget to achieve target market goals
 - SWOT Analysis
 - The goal is to determine what measures would be ideal and what levels would signal success, such as:
 - How much time is spent in GATEWAY,
 - Which products & services receive the most traffic,
 - Percentage of renewals,
 - Identify target audiences that use the platform the most / the least, etc.
- 6) As the GATEWAY platform grows, to provide a framework to determine the pricing structure for new products & services that are added over time
- Over time CADSI will be developing new products and services for its members and additional non-member target audiences. CADSI's desire is to be able to easily add these new products into GATEWAY and to have a framework allowing for easy, systematic determination of how to price and launch the new tools
 - What type of model is best suited for Gateway?
 - A la carte
 - Bundled
 - Amazon Prime style
 - Additional services
 - Advertising
 - Job Postings
 - **Important Notes for My CADSI project**
 - After signing of a non-disclosure agreement, CADSI will share access to the myCADSI portal and existing GATEWAY tools for examination and to create a project proposal.

Submission Requirements

- 1) Describe your company and its capabilities. In particular, support your capacity to perform the work that likely will be associated with this Scope of Work. Indicate which services you would perform in-house and which would require outside vendors.
- 2) Describe your company’s role in similar engagements, particularly those involving not for profit, industry or associations
- 3) Please include a current client roster, including a lead contact name and telephone number of those organizations or businesses that you service. References should be companies or institutions that have contracted services similar in scope.

Deliverables and Timelines

Proposals should be submitted to Canadian Association of Defence & Security Industries, 251 Laurier Avenue suite 300, Ottawa ON K1P 5J6, Attn: Steven Hillier, Associate Vice President Business Development & Operations. One (1) original and three (3) copies of the proposal must be submitted no later than Friday, May 3rd, 2019 at 4:00 p.m. EST at the above office (the “Due Date”).

An electronic version of the proposal must be included on thumb drive or delivered by e-mail to rfp@defenceandsecurity.ca by the Due Date. The proposal should be no longer than six (6) pages. A one-page cover letter may accompany the proposal.

Initial timelines:

Deadline	Item	Description
April 16, 2019	Release of RFP	CADSI releases RFP
April 16, 2019 – April 26, 2019	Q & A	CADSI will answer questions regarding RFP. Questions will be shared with all proponents who’ve identified they will be participating.
April 29, 2019	Webinar	CADSI will organize a webinar for proponents who have identified they will participate and have signed the non-disclosure
May 3, 2019 – 16:00hrs	Submission of Proposal	Proponents confirms participation in RFP by submitting proposal on time.
May 6 – 10, 2019	Evaluation of Proposals	<p>A selection committee composed of CADSI staff (the “committee”) will evaluate the proposals and recommend to the Executive Director for engagement of CADSI.</p> <p>Proposals will be evaluated on many criteria deemed to be in CADSI’s best interest, including but not limited to:</p> <ul style="list-style-type: none"> ▪ Cost 15% ▪ Answering requirements of RFP – 25% ▪ Innovative, forward thinking solutions – 20%

		<ul style="list-style-type: none"> ▪ Launch & onboarding process – 20% ▪ Planning & organization – 20%
May 13, 2019	Invite to Present	Selection of Top Proponents / Notification to Unsuccessful Proponents
May 15 – 17, 2019	Presentation of Pitches to CADSI	Presentation should include agency capabilities, examples of relevant works, references, research approach, timelines Grading scale will be as per below; <ul style="list-style-type: none"> ▪ Answering requirements of RFP – 35% ▪ Innovative, forward thinking solutions – 25% ▪ Launch & onboarding process – 20% ▪ Planning & organization – 20%
May 28, 2019	Selection Announcement	Contract Award / Notification to Unsuccessful Proponents
June 10, 2019	Agreement	Initial agreement and invoice between CADSI and Proponent
August 22, 2019	Service Provider Presentation	Presentation of Initial Business Plan
August 29, 2019	Revisions	Presentation revisions as required
September 5, 2019	Final Presentation	Final Presentation of Business Plan

Moving forward, CADSI would require Proponent to provide a project plan approved by CADSI including:

- Initial briefing meeting with CADSI
- Project management progress meeting schedules with CADSI
- Business plan presentation to CADSI
- De-brief with CADSI and, if necessary, revision
- All work to be completed to the satisfaction of the CADSI

Contract Value

The value of this contract will be negotiable between CADSI and Proponent and based on level of professional expertise and effort required by Proponent to deliver this project and agreed to SOW. Proponent is invited to provide an outline of budget and schedule during this initial phase.

CADSI does not want to restrict proponent’s creativity and potential solutions in their proposals. To that end proponents are invited to provide optional budgets

Confidentiality, Property and Non-Disclosure

Proponent shall treat and keep confidential this RFP and all information shared by CADSI for the purposes of this project as well as not disclosing any confidential information to any person(s) or parties,

except those as required to assist in the fulfillment of this project, without the expressed written consent of CADSI. CADSI shall retain all rights to the final project and is the sole and exclusive owner of myCADSI, GATEWAY and its business plan.

Proposal Understanding

By submitting a proposal, Proponent agrees and assures that the specifications are adequate, and the Proponent accepts the terms and conditions herein. Any exceptions should be noted in the Proponents proposal. Unless otherwise specified, all proposals shall be valid for 90 days from the Due Date of the proposal. Proposals received after the Due Date will be returned unopened. Proponents are strongly encouraged to submit proposals in advance of the Due Date to avoid the possibility of missing the Due Date because of unforeseen circumstances. Proponent assume the risk of the methods of dispatch chosen. CADSI assumes no responsibility for delays caused by any package or mail delivery service. All proposals must be received by the Due Date; postmarking by the Due Date WILL NOT substitute for receipt of proposal.

Additional time will not be granted to any Proponent. Additional time may be granted to all Proponent if CADSI determines that circumstances require it. A cover sheet with the following information must be displayed on the proposal package:

- Name of Proponents,
- Address of Proponent
- Due Date

Proposals may be withdrawn or amended by proponent at any time prior to the Due Date. If CADSI determines that a significant mistake has been made by an apparent low bidder, the Proponent may be given the option of fulfilling the contract at the proposed price or withdrawing the proposal. If an extension error has been made, the unit price will prevail.

Award of Proposal

CADSI's objective is to award the proposal to one proponent. However, CADSI reserves the right to award this proposal on an item-by-item basis or a group of items. CADSI reserves the right to reject any or all proposals, in whole or in part, and is not necessarily bound to accept the lowest cost proposal. CADSI has not committed itself to undertake the work set forth in this RFP. CADSI reserves the right to reject any and all bids, and to enter into negotiations with one or more bidders. CADSI reserves the right to make those decisions after receipt of responses. CADSI's decision on these matters is final.

Contact:

Steven Hillier

Associate V.P. Business Development and Operations,
(613) 235-5337 Ext. 22,
Email: rfp@defenceandsecurity.ca