

July 17, 2019



REQUEST FOR PROPOSAL

CONSULTING SUPPORT FOR AGENCY PLANNING PROCESS

For

St. Leonard's Community Services Inc.

Date: Thursday, July 18, 2019

Proposal Due Date and Time: Friday, August 16, 2019 at 4:00 pm

REQUEST FOR PROPOSAL – PLANNING SERVICES
St. Leonard's Community Services

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1.0 STATEMENT OF CONFIDENTIALITY AND NON-DISCLOSURE

All data submitted to the receiving party is provided in reliance upon its consent not to use or disclose any information contained herein except in the context of its business dealings with St. Leonard's Community Services Inc. The recipient of this document agrees to inform present and future employees of the receiving party who view or have access to its content of its confidential nature.

The recipient agrees to instruct each employee that they must not disclose any information concerning this document to others except to the extent those matters are generally known to, and are available for use by, the public. The recipient also agrees not to duplicate or distribute or permit others to duplicate or distribute any material contained herein without St. Leonard's Community Services Inc. express written consent.

St. Leonard's Community Services Inc. retains all title, ownership and intellectual property rights to the materials and trademarks contained herein, including all supporting documentation, files, marketing material, and multimedia.

BY ACCEPTANCE OF THIS DOCUMENT, THE RECIPIENT AGREES TO BE BOUND BY THE AFOREMENTIONED STATEMENT.

2.0 GENERAL INSTRUCTIONS

2.1 Invitation

St. Leonard's Community Services Inc. (the Agency) is soliciting proposals from qualified firms for the provision of:

- Agency Annual Planning Services commencing in 2019, for a term of up to 3 years with an option to renew for up to an additional 3 years.
- Agency Strategic Planning services in 2022

The Service Agreement (Agreement) resulting from the acceptance of a proposal shall be approved by the Agency and shall contain, at minimum, applicable provisions of the Request for Proposal (RFP). The Agency reserves the right to reject any or all proposals which do not conform to the RFP or needs of the Agency.

The key objectives in requesting planning proposals are:

- To address the full scope of the project, consisting of the following components:

Staff survey (October - November 2019)

- Review previous survey results and review existing survey questions for employee survey
- Obtain feedback from Agency authority and revise (if required)
- Implement survey, using a confidential method of collecting data
- Analyze input obtained from employee survey process and collate. Prepare report of survey findings

Pre-Planning Event (Staff Brainstorming) (late November 2019)

- Develop presentation of employee survey results and develop agenda/materials for brainstorming day with the staff and senior managers
- Review with Agency authority and revise (if required)

Planning Event (November/early December 2019)

- Facilitate a 1-day brainstorming event involving 50-60 staff members
- Following the event, prepare a summary written report, documenting the outputs produced during the planning event
- Review with project authority and revise (if required)

Strategic Planning (January 2022)

- Review objectives and develop survey instrument for community survey
- Obtain feedback from Agency authority and revise (if required)
- Implement community survey, using a confidential method of collecting data
- Analyze input obtained from community survey process and collate. Prepare report for presentation of survey findings
- Develop presentation of employee (from the survey results in the fall of 2012) and community survey results and staff planning day outputs and develop agenda/materials for strategic planning day with the Board and senior management
- Review with Agency authority and revise (if required)
- Facilitate a 1 day strategic planning event involving 10-20 Board and staff members
- Following the event, prepare a summary written report, documenting the outputs produced during the planning event
- Review with project authority and revise (if required)

2.2 Proposal Documents, Delivery and Deadline

Proponents are requested to submit via email or by mail a copy of their proposal to:

Attention: Mr. Brad Stark, CPA, CA, Executive Director
St. Leonard's Community Services Inc.
P.O. Box 638, 133 Elgin Street
Brantford, ON N3T 5P9

Or via Email – bstark@st-leonards.com

Proposals must be received by **4:00 pm, Friday, August 16, 2019**

The name and address of the proponent must be clearly indicated.

Proponents may not make modifications to their proposal after the closing date and time.

The Agency shall not be obligated in any way by any proponent's response to this RFP, nor shall the Agency be liable for costs incurred by any proponent in the preparation of this RFP.

All information provided in the proponent's proposal will be considered confidential.

The proposals will be reviewed by the Agency's Management Team who will select three proponents deemed to be the most qualified to meet the needs of the Agency.

The selected proponents may be asked to present their proposal to the Management Team or participate in an interview process.

Late proposals received after the specified closing time will be returned, unopened, to the proponent.

The successful proponent will be contacted within 30 days of closing of the RFP. All other proponents will be notified upon acceptance of the successful candidate.

2.3 Inquiries

All inquiries or clarification requests regarding this RFP shall be directed by email only to Elaine Smith, email - esmith@st-leonards.com. Inquiries must be received by noon August 9, 2019. Responses to clarification requests will be provided to all proponents via email.

3.0 SERVICE HISTORY

As a registered charitable corporation in receipt of government funding, St. Leonard's Community Services Inc. is expected to show due diligence in respect of the costs incurred to maintain all service agreements. This Request for Proposal pertains to the Planning services required by the Agency. Our Procurement Practices policy, stipulates that we are required to "ensure that publicly funded goods and services, including consulting services are acquired by Broader Public Sector (BPS) organizations through a process that is open, fair and transparent". We are required to obtain 3 quotes for consultative services.

4.0 BACKGROUND

St. Leonard's Community Services Inc. is a registered Charity whose mandate is to provide programs and services in Addictions and Mental Health, Housing, Justice and Employment that enable community members to overcome challenges through choices that result in positive change.

The Agency's head office is located at 133 Elgin Street Brantford. The website is www.st-leonards.com. At present, the Agency's volunteer Board of Directors is comprised of 12 members. These members are representatives of the Brantford-Brant community and the Board of Directors is responsible for the overall activities of the Agency.

The Agency currently delivers services to the Brantford-Brant Haldimand communities at 12 locations in Brantford, Caledonia and Dunnville.

The Agency has an annual operating budget of \$11 million and employs approximately 170 full and part time staff.

4.1 General

- I. The Agency is requesting proposals from Strategic Planning organizations that are both interested and capable of providing the Agency with planning services.
- II. The onus is on the proponent to demonstrate their knowledge, understanding and capacity to conduct the work as outlined in the RFP. The proposals will be assessed according to how well they assure the Agency success in relation to the RFP requirements. The detail and clarity of the written submission will be considered indicative of the proponent's expertise and competence.

- III. All information provided in response to this RFP must contain sufficient detail to support the services being proposed. Incomplete submissions will not be considered.
- IV. Please provide a brief explanation of why your organization should be selected (specific, detailed, verifiable information).

V. Fee Structure and Financial Considerations

Proponents must fully describe their proposed fee structure for all the services to be provided.

VI. References

The proposal must provide two relevant corporate references. Please select clients that are similar in nature to St. Leonard's Community Services Inc. and provide the contact's name, phone number and email address.

5.0 EVALUATION CRITERIA

5.1 Evaluation Process

All submissions will be reviewed by the Executive Director to ensure they meet the mandatory requirements and will consider overall completeness and suitability of the responses. All responses will be evaluated against the evaluation criteria. A short list will be selected for interview and evaluation.

6.0 RIGHTS RESERVED BY THE AGENCY

The Agency is not liable for any costs incurred by the proponent in the preparation of their response to the RFP or selection interviews, if required. Furthermore, the Agency shall not be responsible for any liabilities, costs, expenses, loss or damages incurred, sustained or suffered by any proponent, prior or subsequent to, or by reason of the acceptance, or non-acceptance by the Agency of any proposal, or by reason of any delay in the award of the proposal.

- a) The proposal with the best pricing alternative will not necessarily be accepted. The Agency reserves the right to accept/reject any or all proposals and/or re-issue the RFP in its original or revised form.
- b) The Agency reserves the right to request specific requirements not adequately covered in their initial submission and clarify information contained in the RFP.
- c) The Agency reserves the right to modify any and all requirements stated in the RFP at any time prior to the possible awarding of the Agreement.

- d) The Agency reserves the right to cancel this RFP at any time, without penalty or cost to the Agency. This RFP should not be considered a commitment by the Agency to enter into any Agreement.
- e) In the event of any disagreement between the Agency and proponent regarding the interpretation of the provisions of this RFP, the Executive Director for the Agency, or an individual acting in that capacity, shall make the final determination as to interpretation.

6.1 Treatment of Information

- a) The information submitted in response to this RFP will be treated in accordance with the relevant provision of the Personal Information and Protection of Electronic Documents Act (PIPEDA). The information collected will be used solely for the purposes stated in this RFP.
- b) The proponent does, by the submission of a proposal, accept that the information contained in it will be treated in accordance with the process set out in this section of the RFP.

6.2 Infringements and Indemnifications

Proponents shall protect, defend and save St. Leonard's Community Services Inc. harmless from suits or actions of every nature and description brought against it, for or on account of any injuries or damages received or sustained by a part or parties, by or from any of the acts of the proponent, and/or the agents, employees, successors or assigns of the proponent.