



Application Guidelines

Request for Quotations (RFQ)

To Provide Business Integration Consulting Services

Issued: August 12, 2019

Application Deadline: August 26, 2019, 5:00p.m.
EST

Please submit proposals to: Altaf Alamin
Procurement Officer
Surrey Place
2 Surrey Place
Toronto ON M5S 2C2
altaf.amin@surreyplace.ca

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1. Background

Surrey Place is issuing a Request for Quotations (RFQ) to select a consultant that will help Senior Management create an appropriate strategic framework, process, range of potential organizations, timelines, budget and metrics to explore business integration and non-traditional collaboration options that can help the organization maximize its mission, vision and values.

This RFQ has been initiated as a standard procurement procedure to meet the requirements of the Broader Public-Sector Accountability Act, 2010 and its associated Procurement Directive, 2011 and in accordance with Surrey Place's [procurement policy](#),

About Surrey Place

Located in Toronto, Surrey Place provides specialized clinical services that are responsive to individual's needs and promote health and well-being.

We help children and adults living with developmental disabilities, autism spectrum disorder and visual impairments reach their full potential. Surrey Place employs a multi-disciplinary professional workforce of approximately 480 employees including, but not limited to, Intensive Behavioural Intervention (IBI) and Applied Behavioural Analysis (ABA) therapy, behavioural therapy, medicine, psychiatry, psychology, social work, speech language pathology, audiology, nursing, occupational therapy as well as other professional specialties.

As a lifespan organization, Surrey Place is the lead agency for autism services in Toronto and on behalf of the Ontario government operates Developmental Services Ontario for the Toronto region responsible for determining eligibility for adults with a developmental disability and linking them with available and appropriate services. We are also the lead agency for the Children's Special Needs Strategy in collaboration with community partners. We operate the MMW Video Conferencing program providing clinical supports, consultation and education in collaboration with Provincial Partners in Northwest Ontario. Surrey Place is the lead for the Dual Diagnosis Primary Care Initiative whose focus is to improve primary care for adults with developmental disabilities by creating best practice Guidelines and Tools. In addition, Surrey Place is the lead agency for the Specialized Network of Care in Toronto.

Surrey Place Centre serves over 7,000 clients a year with a \$80 million annual budget and 12 locations in the GTA.

Surrey Place is affiliated with the University of Toronto and other academic institutions and is a teaching site for students in a variety of health care professions. Surrey Place is accredited by Accreditation Canada.

More information about Surrey Place can be found here:

<http://www.surreyplace.on.ca/about-us/>

Over the period March 31, 2015 to March 31, 2019 the organizational revenues have increased by \$36M or 82% due largely to expansion of children’s autism services, developmental services and targeted business development.

With the recent Government of Ontario changes to the Ontario Autism Program and priorities for finding efficiencies in funded social programs the organization needs to re-evaluate its strategies for expansion and sustainability inclusive of business integrations and non-traditional collaborations.

2. Scope of Services

Drawing from your experience in nonprofit business integration and non-traditional collaborations, the qualified consultant will develop an appropriate strategic framework, process, range of potential organizations, timelines, budget and metrics to explore business integration and non-traditional collaboration options that can help Surrey Place maximize its mission, vision and values.

The scope of services should include but not necessarily be limited to:

1. References to leading government and thought leadership guidance
2. Appropriate examples or high-level case studies of successful business integrations and non-traditional collaborations
3. A high-level strategic framework and process
4. A high-level range of potential organizations and rationale for potential integrations and/or non-traditional collaborations
5. A proposed timeline, budget and metrics to assist management in actioning and monitoring progress including appropriate engagement and reporting to the board of directors

3. Form of Proposals

All proposals are required to include:

- A detailed overview of your firm, including:
 - The year your firm was established, number of employees, number of clients and the number of those clients in the not-for-profit sector
 - Services offered
 - A curriculum vitae for each key professional proposed to be integrally involved in developing the marketing workplan, including any relevant highlighted achievements.
 - A fee guide for services that may be available post this engagement for ancillary supports as Surrey Place implements its follow up work
 - References from at least three (3) current, comparable clients of similar size and scope of Surrey Place, where possible. (Surrey Place will not contact references without the firm's written approval)
- A description of the process through which an appropriate strategic framework, process, range of potential organizations, timelines, budget and metrics to explore business integration and non-traditional collaboration options and a draft outline of what this may look like to assist Surrey Place in maximizing its mission, vision and values.
- Appropriate examples or high-level case studies of successful business integrations and non-traditional collaborations
- Proposed budget for the engagement

4. Evaluation Criteria

Proposals will be evaluated based upon the following criteria:

| | Evaluation Domain | Weight |
|---|---|--------|
| 1 | Professional qualifications and experience | 10% |
| 2 | Description of the process through which an appropriate strategic framework, process, range of potential organizations, timelines, budget and metrics to explore business integration and non-traditional collaboration | 15% |
| 3 | Draft example of a strategic framework, process, range of potential organizations, timelines, budget and metrics to explore business integration and non-traditional collaboration | 15% |
| 4 | Appropriate examples or high-level case studies of successful business integrations and non-traditional collaborations | 15% |
| 4 | Cost/Pricing | 25% |
| 5 | Quality of the proposal | 5% |
| 6 | Quality of the presentation | 5% |
| 7 | Examples or case studies of Knowledge and/or relevant or transferable experience of the sectors in which Surrey Place operates | 5% |
| 8 | Quality of references | 5% |

Please note that:

- Submissions that do not meet the evaluation criteria may be disqualified.
- In order to be fair to all applicants:
 - Late submissions will not be accepted
 - Emails to discuss the RFQ will be shared with all potential applicants
- All applicants will be notified when their proposal is received by Surrey Place.
- Only short-listed applicants will be contacted for an interview/presentation.

5. Terms and Conditions

Delivery of Proposal

Sealed envelopes containing four hard copies of your proposal must be received at the address noted below

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|-----------------------------|---|
| Please submit proposals to: | Altaf Alamin Procurement Officer Surrey Place 2 Surrey Place Toronto ON M5S 2C2 altaf.amin@surreyplace.ca |
|-----------------------------|---|

Application Deadline: Aug 26, 2019, 5:00p.m. EST

Please also submit one (1) electronic copy to: altaf.amin@surreyplace.ca

Proposal Time Limit

Each bidding firm shall commit that the proposal is valid and accurate for 120 days from the closing date Aug 26, 2019.

Selection Process

Surrey Place reserves the right to accept or reject any proposals. Surrey Place will review all applications. The award will be based on a review of the proposals against all evaluation criteria and will not necessarily be awarded based on the lowest price offered. Each firm will be provided with fair access to information, as requested by e-mail or in writing (see Key Dates). Additional written materials, to ascertain the qualification of applicant may be requested.

Inquiries

Applicants should e-mail (please do not telephone) all questions to:
altaf.amin@surreyplace.ca

Liability Insurance

All firms are requested to warrant that the firm does not currently have any outstanding liability claims that may impact on the future health of the firm. Additionally, the firm must maintain sufficient liability insurance relevant for a client of our size. The liability coverage must be confirmed.

Conflict of Interest

Applicants responding to this RFQ may not have any undeclared personal or business interest that would present an actual, potential or apparent conflict of interest with the performance of the contract to be awarded.

Distribution of the Invitation for Proposals

This RFQ has been released by invitation only

Surrey Place is not Committed to Applicant's Expenses

The application process will not necessarily result in a commitment to sign a contract with the applicant. Surrey Place shall not be liable for any expenses incurred by any applicant, including the expenses associated with the cost of preparing the Application.

Expense claim and reimbursement rules

Surrey Place will not pay or reimburse an applicant for any hospitality, incidental or food expenses, including but not limited to expenses in respect of meals, snacks, beverages, gratuities, laundry or dry cleaning, valet services, dependent care, home management and personal telephone calls. Reimbursement for allowable expenses can be claimed and reimbursed only when the contract specifically provides for it.

External Factors

Surrey Place reserves the right to withdraw this RFQ or terminate the resulting contract within the terms of the contract without penalty.

Bid Dispute Resolution Process and Procedure

Unsuccessful applicants can request a debriefing within 60 calendar days following the date of the contract award notification. The request should be submitted to Procurement Officer. The Procurement Officer will respond to the vendor and arrange an applicant debriefing with 10 business days of receiving the request.

When conducting vendor debriefings, Surrey Place will:

- Confirm with each applicant the date, time and location of the debriefing session in writing;
- Conduct separate debriefings with each applicant;
- Not disclose information concerning other applicants, other than the names and addresses of applicants who participated in the competitive process
- Not answer questions unrelated to the competitive process;

- Provide a general overview of the evaluation process set out in the procurement document;
- Discuss strengths and weaknesses of an applicant’s submission in relation to the specific evaluation criteria.
- Provide suggestions on how the applicant may improve future submissions;
- Address questions and issues raised by the applicant in relation to their submission.

Subsequent the applicant debriefing, if an applicant wishes to dispute the outcome of the procurement process, the aggrieved party is to file the bid protest in writing, with Vice President, Finance and Administration, by registered mail, within 10 business days of the debriefing meeting. A protest in writing shall include the following:

- The name and address of the Complainant;
- Identification of the contract or bid solicitation being protested;
- The date of debriefing and name of procurement officer who conducted the debriefing;
- Detailed and factual statement of the grounds for protest;
- The Complainant’s arguments and supporting documentation; and
- The Complainant’s requested remedy.

The Vice President, Finance and Corporate Services will respond, in writing, to the Complainant within 10 business days of receiving the protest. The final decision on the issue will come from the Vice President, Finance and Corporate Services, in consultation with the Chief Executive Officer and shall be considered final and conclusive.

Information disclosure

Any confidential information supplied to Surrey Place may be disclosed by Surrey Place where it is obliged to do so under the Freedom of Information and Protection of Privacy Act (FIPPA), by an order of a court or tribunal or otherwise required at law.

6. Key Dates and Contact Information

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| RFQ Issue Date | Monday August 12, 2019 |
| Bidder’s questions deadline | Monday August 19, 2019, 5:00p.m. EST |
| Deadline for proposals | Monday Aug 26, 2019, 5:00p.m. EST |

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