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**Application Guidelines**

**Request for Proposals (RFP)**

**Education and Training Workshop: Equity, Diversity, Inclusion and Accessibility**

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| **Issued:** | **Monday June 05, 2023** |
| **Application Deadline:** | **Friday, June 30, 2023**  **5:00p.m. EST** |
| **Please submit proposals to:** | **Tarvinder Kaur Bawa**  **Procurement Officer**  **Surrey Place**  **2 Surrey Place**  **Toronto ON M5S 2C2**  [**tarvinder.bawa@surreyplace.ca**](mailto:tarvinder.bawa@surreyplace.ca) |

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7. **Background**

Surrey Place is issuing a Request for Proposals (RFP), inviting firms to showcase their expertise in delivering comprehensive Equity, Diversity, Inclusion and Accessibility (EDIA) educational training programs for all our staff members.

This RFP 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 <https://www.surreyplace.ca/about-us/policies-disclosures/#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 with services and supports they need to lead a healthy and happy life.Surrey Place employs a multi-disciplinary professional workforce of approximately 550 employees including, but not limited to, IBI and ABA therapy, behavioral therapy, medicine, psychiatry, psychology, social work, speech language pathology, audiology, nursing, occupational therapy as well as other specialists.

As a lifespan organization, Surrey Place is the lead agency for providing clinical services to individuals and their families. We provide autism services in Toronto and on behalf of the Ontario government operates Developmental Services Ontario for 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. We pride ourselves on being recognized as a trusted partner and an expert in the sector, rooted in an approach that empowers both our client and their circle of care.

Surrey Place Centre serves over 13,000 clients a year with a $70 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:

[**https://www.surreyplace.ca/**](https://www.surreyplace.ca/)

1. **Scope of Services**

The purpose of this request for proposal is to establish and implement comprehensive education and training workshops that will equip Surrey Place's entire workforce (approximately 500 employees) with the fundamental knowledge required to promote Equity, Diversity, Inclusion, and Accessibility (EDIA).

Services required from the successful firm include:

1. Customize education and training workshops to cater to the needs of Surrey Place's staff, including Senior Management, leadership, front-facing staff, and others.
2. Collaborate with Surrey Place's Working Towards EDIA Group to review the workshop, incorporate their feedback on the training plan and approach, and make necessary adjustments.
3. Conduct education and training workshops to raise staff awareness about the support requirements of individuals from systemically oppressed groups.
4. Offer a variety of hybrid learning opportunities, such as e-learning and face-to-face, to provide flexibility in training delivery.
5. Create a safe environment for interactive staff engagement during the workshops, encouraging participants to share, reflect, and ask questions about the learning.
6. Provide resources for additional independent lifelong learning on EDIA topics.
7. Demonstrate expertise in a range of EDIA-related topics that can be covered in the education and training workshops.
8. **Form of Proposals**

All proposals are required to include:

**A detailed overview of your firm, including:**

* An overview of the firm, year your firm was established, number of clients served including services offered, specific areas of consulting expertise and potential relevance to Surrey Place;
* Brief listing of similar projects previously undertaken that may be of relevance.
* A list of other similar clients in our industry.
* A list of topics of expertise for education and training workshops related to EDIA
* Evidence of qualifications to provide the services described in section 1. Scope of Services.
* A curriculum vitae for consultant or consultants proposed to provide the outlined project management and technology services, including highlighted achievements.
* Fees, Consulting costs.
* 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)

1. **Evaluation Criteria**

Proposals will be evaluated based upon the following criteria:

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|  | Evaluation Domain | Weight |
| 1 | * Professional qualifications and experience | 20% |
| 2 | * Knowledge and experience of the sectors in which Surrey Place operates | 20% |
| 3 | * Cost/Pricing | 20% |
| 4 | * Quality of the proposal in meeting the scope requirements | 10% |
| 5 | * Degree of fit between both organizations and willingness to contribute to the organization’s vision and mission | 10% |
| 6 | * Quality of the presentation, interview and reference checks | 20% |

Please note that:

* Submissions that do not meet the evaluation criteria will be disqualified.
* In order to be fair to all applicants, late submissions and phone calls or emails to discuss the applications status will not be accepted.
* Only short-listed applicants will be contacted for an interview/presentation.

1. **Terms and Conditions**

**Delivery of Proposal**

Please send electronic copy via email to [tarvinder.bawa@surreyplace.ca](mailto:tarvinder.bawa@surreyplace.ca) by Friday, June 30th, 2020, 5:00p.m. EST.

**Proposal Time Limit**

Each bidding firm shall commit that the proposal is valid and accurate for 120 days from the closing date June 30th, 2023.

**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: [tarvinder.bawa@surreyplace.ca](mailto:tarvinder.bawa@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 RFP may not have any 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 invitation has been released:

* By publication on Surrey Place Centre’s website and MERX.COM
* By invitation

**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 RFP 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 (if value of Procurement is 100,000 or more) 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 Corporate Services, 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.

1. **Key Dates and Contact Information**

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| --- | --- |
| RFP Issue Date | Monday June 05, 2023, 5:00p.m. EST |
| Bidder’s questions deadline | Tuesday June 13, 2023, 5:00p.m. EST |
| Deadline for proposals | Friday June 30, 2023, 5:00p.m. EST |

Tarvinder Kaur Bawa

Procurement Officer

Surrey Place

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