

# SURREY PLACE

## Application Guidelines

### Request for Proposals (RFP)

#### To Provide Marketing Strategy & Campaign Management

<b>Issued:</b>	Friday, November 12 <sup>th</sup> , 2021
<b>Application Deadline:</b>	Friday December 3 <sup>rd</sup> , 2021, 5:00p.m. EST
<b>Please submit proposals to:</b>	Eric Chen Procurement Officer Surrey Place 2 Surrey Place Toronto ON M5S 2C2 <a href="mailto:Eric.chen@surreyplace.ca">Eric.chen@surreyplace.ca</a>

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## 1. Background

Surrey Place is issuing a Request for Proposals (RFP) to select a firm to develop and execute a strategic marketing campaign for its children's autism services, to target existing and new clients as the organization enters into a more competitive fee for service environment.

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 [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 special needs reach their full potential. Surrey Place employs a multi-disciplinary professional workforce of approximately 480 employees offering services such as: Applied Behaviour Analysis (ABA) therapy, Intensive Behavioural Intervention (IBI), behavioral therapy, medicine, psychiatry, psychology, social work, speech-language pathology, audiology, nursing, and occupational therapy.

As a lifespan organization, with over 60 years of experience, Surrey Place plays a leadership role for many specialized programs. Surrey Place is the lead agency for autism services in Toronto. On behalf of the Ontario government, Surrey Place operates Developmental Services Ontario (DSO) for Toronto region, which is responsible for determining eligibility for adults with a developmental disability and linking them to available and appropriate services. We are also the lead agency for Coordinated Service Planning (CSP) in collaboration with community partners. We operate the MMW Video Conferencing Program which provides clinical supports, consultation and education in collaboration with provincial partners in Northwest Ontario. Surrey Place is the lead for the Developmental Disabilities Primary Care Program (DDPCP) 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 Community Networks of Specialized Care (CNSC) in Toronto.

Surrey Place serves over 9,000 clients and caregivers a year with a \$65 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.ca/about-us/>

## 2. Scope of Services

Services required from the successful firm include:

1. Research & Competitive Analysis
2. Develop Marketing Campaign Strategy
3. Campaign Development
4. Campaign Management & Execution
5. Set Campaign Objectives & Evaluate ROI

## 3. Form of Proposals

All proposals are required to include:

- **An overview of your agency;** including year agency was established, number of current employees, any professional qualifications or awards, a list of the employees/roles within your agency that would support this project.
- **An overview of your services;** including specific areas of expertise and potential relevance to Surrey Place.
- **A client overview;** including a list of your agency's top five clients (by revenue), percentage of total revenue and tenure with agency.
- **A brief description of similar projects** previously undertaken that may be of relevance, including projects for not-for-profit clients entering into a fee-for-service environment.
- **A 150-word explanation of why** your agency is a good fit for Surrey Place.
- **One case study** (maximum 1000 words) to demonstrate your strategic approach, campaign development and execution capabilities.
- **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 your agency's written approval).

#### 4. Evaluation Criteria

Proposals will be evaluated based upon the following criteria:

	Evaluation Domain	Weight
1	<ul style="list-style-type: none"><li>Professional overview experience</li></ul>	30%
2	<ul style="list-style-type: none"><li>Case Study</li></ul>	30%
3	Degree of fit between both organizations and knowledge and/or relevant or transferable experience of the sectors in which Surrey Place operates	30%
	<ul style="list-style-type: none"><li>Overall quality of the proposal</li></ul>	5%
4	<ul style="list-style-type: none"><li>Quality of references</li></ul>	5%

Please note that:

- Estimated Campaign Budget is 350-400K (including tax) and must include all fees including, media costs, agency fees production and execution costs and applicable taxes. The final budget and scope will be negotiated with the successful agency.
- Estimated Campaign Timing – Spring 2022
- 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.

#### 5. Terms and Conditions

##### Delivery of Proposal

Please send electronic copy via email to [eric.chen@surreyplace.ca](mailto:eric.chen@surreyplace.ca) by **Friday, Dec 3<sup>rd</sup>, 2021, 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 **Friday, Dec 3<sup>rd</sup>, 2021, 5:00p.m. EST**

##### 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. 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:  
[eric.chen@surreyplace.ca](mailto:eric.chen@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 website and MERX.COM

### **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 ICT, 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 the 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 ICT 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 ICT, 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

RFP Issue Date	<b>Friday, Nov 12<sup>th</sup>, 2021</b>
Bidder's questions deadline	<b>Friday, Nov 19<sup>th</sup>, 2021, 5:00p.m. EST</b>
Deadline for proposals	<b>Friday, Dec 3<sup>rd</sup>, 2021, 5:00p.m. EST</b>

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