

SURREY PLACE

Application Guidelines

Request for Quotations (RFQ)

To Provide Strategic Planning Consulting Services

Issued:	Monday, November 15 th , 2021
Application Deadline:	Monday December 06, 2021, 5:00p.m. EST
Please submit proposals to:	Eric Chen Procurement Officer Surrey Place 2 Surrey Place Toronto ON M5S 2C2 Eric.Chen@surreyplace.ca

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1. Background

Surrey Place is issuing a Request for Quotations (RFQ) to select a firm that will help the Board of Directors and Senior Management create an appropriate multi-year strategic plan as the organization enters a significant period of change and government funding transformation including a more competitive fee for service environment for a large part of our business.

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 to reach their full potential. Surrey Place employs a multi-disciplinary professional workforce of approximately 480 employees including, but not limited to, Intensive Behavioral Intervention (IBI) and Applied Behavioral Analysis (ABA) therapy, behavioral 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 the Toronto autism network 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 \$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.on.ca/about-us/>

2. Scope of Services

Surrey Place is requesting proposals from qualified and experienced consulting firms to develop an appropriate multi-year strategic plan for our organization that is reflective of the current and anticipated operating environment.

Our current strategic plan 2020-2022 can be viewed [here](#)

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

1. An appropriate process, facilitation, and timelines to involve and engage key stakeholders including families, clients, community partners, staff, volunteers, existing and potential funders, and other targeted stakeholders
2. The identification of modern business approaches and tools that will be utilized to assist the board, management, and stakeholders in considering potential scenarios, impacts and strategic directions that may be associated with current and emerging trends, risks and opportunities with:
 - Population definition, analysis and targeting
 - Geographic areas of need definition, analysis and targeting
 - Specialized clinical developmental disability and autism service delivery
 - Provincial, municipal, and federal government funding
 - Foundation and corporate giving
 - Public sector competition associated with fee for services, business development and marketing
 - Systems leadership, influence and change inclusive of innovation, research, evaluation, and advocacy
 - Public sector priorities like corporate service transformation, mergers, acquisitions, and innovative collaboration

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 the strategic plan.
 - 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)
- The identification of modern business approaches and tools that will be utilized to assist the board, management, and stakeholders in considering potential scenarios, impacts and strategic directions that may be associated with current and emerging trends, risks and opportunities.
- 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	Proposed strategic planning process, facilitation and timelines	15%
3	Proposed approach to stakeholder engagement through strategic planning process	15%
4	Proposed modern business approaches and tools to analyze and understand current and emerging trends, risks and opportunities with: <ul style="list-style-type: none"> • Population definition, analysis and targeting • Geographic areas of need definition, analysis and targeting • Specialized clinical developmental disability and autism service delivery • Provincial, municipal and federal government funding • Foundation and corporate giving • Public sector competition associated with fee for services, business development and marketing • Systems leadership, influence and change inclusive of innovation, research, evaluation and advocacy • Public sector priorities like corporate service transformation, mergers, acquisitions and innovative collaboration 	20%
5	Cost/Pricing	20%
6	Quality of the proposal	5%
7	Quality of the presentation	5%
8	Knowledge and/or relevant or transferable experience of the sectors in which Surrey Place operates	5%
9	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 of the status of their application.
- 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 by **Monday, Dec 6th, 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 **Monday, Dec 6th, 2021**.

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:
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 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 invitation has been released:

- By publication on Surrey Place 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 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 (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 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 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

RFQ Issue Date	Monday, November 15, 2021
Bidder's questions deadline	Monday November 22, 2021, 5:00p.m. EST
Deadline for proposals	Monday December 06, 2021, 5:00p.m. EST

Eric Chen
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