



**The Neighbourhood Group
Request for Proposal (RFP)
for an Equity Consultant**

Request for Proposal (RFP) Number: TNG-09-2020-DC003

Issue Date: September 11th, 2020

IMPORTANT DATES

Issue Date of RFP	September 11th, 2020
Deadline for Vendor Questions	September 25th 2020 by 5:00 pm
Responses to Questions	October 2nd, 2020 by 5:00 pm
Bid Submission Date	October 9th, 2020 by 5:00 pm
Notification of Preferred Vendor & Contract Award Date	By October 23rd, 2020
Consultant begins work	November 2nd, 2020
Mid-Way Report for the Board	November 1st, 2021
Work Completed	October 28th, 2022

PART 1 – GENERAL INSTRUCTIONS

1.1 INVITATION TO VENDORS

This Request for Proposal (the “RFP”) is issued by The Neighbourhood Group Community Services (“The Neighbourhood Group”) and invites prospective Vendors to submit a proposal for the opportunity to conduct an equity study the organization.

Note: *Appendix D – References:* vendor submissions must reference similar work completed within the previous five (5) years. References for work submitted older/longer than this will be disqualified.

This RFP sets out the requirements for the Vendor’s proposal and specifies the evaluation criteria and Vendor selection process for this phase. Vendors must demonstrate a thorough understanding of the requirements. The objective in issuing this RFP is to obtain the best overall value, considering quality, service, cost and other relevant factors.

1.2 TERMS AND CONDITIONS

1.2.1 Terms of Agreement

The Term of this Agreement shall commence upon the contract award date or such date as may be agreed between the parties, and continue until all requirements are met and deliverables are approved by The Neighbourhood Group, unless terminated earlier. The Neighbourhood Group is under no obligation to extend the scope of the work or engage the Vendor for any subsequent work.

1.2.2 Vendor Responsibility

All proposals are irrevocable after the official closing time. In the event the selected Vendor fails to accept the contract award, The Neighbourhood Group reserves the right to accept the next qualified bid or any bid which meets the RFP specifications.

Proposals received by The Neighbourhood Group after the date and exact time specified may not be considered. It is the responsibility of Vendors to allow sufficient time to

ensure delivery of their proposals to the designated location prior to the stipulated closing time and date. All information required in procurement document forms must be provided to constitute a responsive (valid) bid.

1.2.3 Queries during the RFP

The Vendor will base their proposal on The Neighbourhood Group's RFP documents. It is the responsibility of the Vendor to obtain clarification of any terms, conditions or technical requirements contained in the RFP.

Vendors shall promptly examine all the documents comprising this RFP and (a) shall report any errors, omissions, or ambiguities and (b) may direct questions or seek additional information in writing by e-mail on or before the Deadline for Questions to The Neighbourhood Group's RFP Contact – Amanda Bland (execassistant@sschto.ca). The Neighbourhood Group is under no obligation to provide additional information but may do so at its sole discretion. It is the responsibility of the Vendor to seek clarification from The Neighbourhood Group RFP Contact on any matter it considers to be unclear. The Neighbourhood Group shall not be responsible for any misunderstanding on the part of the vendor concerning this RFP or its process.

Vendors and their representatives may not contact individuals employed or engaged by any member of The Neighbourhood Group (this includes members of the board of directors and/or any committee), other than The Neighbourhood Group RFP Contact, concerning matters regarding this RFP. Only information received by The Neighbourhood Group RFP Contact will be considered in the RFP process. All such communications must be in writing, via email, or through the public e-tendering websites where this RFP has been posted. Any Vendor that does not follow these instructions may be disqualified.

1.2.4 Amendments to the RFP

This RFP may be amended only by an addendum in accordance with this section. Answers to questions or requests from Vendors will be responded to by an addendum which will be issued to all Vendors via those public e-tendering websites in which this RFP has been posted. If The Neighbourhood Group, for any reason, determines that it is necessary to provide additional information relating to this RFP, such information will be communicated to all Vendors by way of addenda through the public e-tendering websites in which this RFP has been posted. Each addendum shall form an integral part of this RFP. Vendors are responsible for obtaining all addenda issued by The Neighbourhood Group.

1.3 EVALUATION OF RESPONSES

Incomplete proposals, namely those that fail to comply substantially with the Mandatory Requirements, Specifications, and/or Specific Terms and Conditions, will be eliminated from further consideration in the evaluation process.

Vendor proposals will be evaluated based on the criteria outlined in Section 3.1 as per weight values indicated in the Evaluation Overview.

The Neighbourhood Group reserves the right to request clarifications and/or confirmations from

any or all Vendors regarding any aspect of the proposal. In the event such clarifications and/or confirmations are requested, The Neighbourhood Group RFP Contact will make the request. The request for clarification and/or confirmation will be directed to the individual named as the Vendor's contact in their proposal. A written response to each such communication is required from the Vendor.

Reference checks may be done to complete the evaluation.

1.4 ACCEPTANCE OF PROPOSALS AND SELECTION

The Neighbourhood Group reserves the right to select based solely on its assessment.

The Neighbourhood Group reserves the right to award a contract or contracts in whole or in part.

The Neighbourhood Group reserves the right not to accept the **LOWEST** or **ANY** proposal submitted.

1.5 PROPOSAL PREPARATION COSTS

All costs incurred in the preparation and presentation of the Vendor's proposal shall be the sole responsibility of the Vendor. All supporting documentation and manuals, if applicable, submitted with the proposal will become the property of The Neighbourhood Group unless requested otherwise by the Vendor at the time of submission.

1.6 VENDOR'S CONFIDENTIAL MATERIAL

Material submitted by any Vendor that is to be considered as confidential must be clearly marked as such.

1.7 DEBRIEFING

Vendors may request a debriefing after receipt of a notification of award. All requests must be made in writing to The Neighbourhood Group RFP Contact and must be made within forty-five (45) days of notification of award. The debriefing will include an outline of the reasons the proposal was not successful, referring to the evaluation criteria. The confidentiality of information relating to all other proposals will be protected. Any debriefing provided is not for the purpose of providing an opportunity to challenge the procurement process.

1.8 CONTRACT OBLIGATIONS

Upon acceptance of a proposal, or any part thereof, either by the issuance of an official order, or otherwise, the Vendor(s) shall, if requested, execute and enter into a formal contract that is satisfactory to The Neighbourhood Group including appropriate protections for the legitimate interests of The Neighbourhood Group such as, but not limited to, warranties respecting performance, to properly secure the resulting contract, and to embody indemnity and related provisions that are deemed to be required to protect The Neighbourhood Group.

1.9 FINAL CONTRACT - CHANGES, DELETIONS AND ADDITIONS:

On completion of the evaluation process, a Vendor may be selected with whom discussions will be undertaken to refine the details of the contract for all or portions of a proposal chosen

by The Neighbourhood Group. Discussions may take the form of adding, deleting, or modifying certain requirements based on the response to the procurement document with appropriate adjustments.

The Neighbourhood Group reserves the right to negotiate price and work schedule amendments with the successful Vendor.

If it appears that the timely signing (within 30 days of award) will not take place as a result of non-acceptance of The Neighbourhood Group's terms and conditions, or through the need for extensive legal review to assess suggested terms, The Neighbourhood Group reserves the right to award the contract to the next most-qualified Vendor or to otherwise terminate the selection process.

Modifications required after execution of the contract will be governed as prescribed in Section 1.10 hereunder.

1.10 CHANGES

The Neighbourhood Group, without invalidating the contract, may make changes by altering, adding to, or deducting from the work, the contract sum being adjusted accordingly. All such work shall be executed under the conditions of the original contract. Such change order shall not be regarded to imply an extension of the time for completion, unless specifically stipulated in the change notice. No change shall be made unless in pursuance of a written order from The Neighbourhood Group and no claim for an addition to the contract sum shall be valid unless so stipulated in the change notice.

The value of any change notice shall be determined as follows:

- i. Quotations submitted in response to the change notice to the Contract shall be fully detailed, itemizing all components required to facilitate the change. Supporting documents and estimates shall be available to The Neighbourhood Group upon request.
- ii. The value of all changes shall be agreed in advance by The Neighbourhood Group and the Vendor on a firm price basis.

1.11 CONFLICT OF INTEREST

During the term of this Agreement, the Vendor shall not undertake or engage in any work for another client that could reasonably result in a conflict of interest. Any conflicts that arise or become apparent during the term of the Agreement shall be immediately disclosed to The Neighbourhood Group, in order for The Neighbourhood Group to determine the most appropriate course of action.

Determination of the existence of a conflict of interest shall be the decision of The Neighbourhood Group, acting not unreasonably, and such decision shall be final.

1.12 PRIVACY

1.12.1 Privacy

The successful Vendor must comply with any applicable privacy legislation and with The

Neighbourhood Group's privacy policies and practices.

1.12.2 Unauthorized Access

The Vendor shall immediately notify The Neighbourhood Group if Confidential Information it handles on The Neighbourhood Group's behalf is stolen, lost, accessed by unauthorized persons or collected, used, or disclosed inappropriately.

1.13 FREEDOM OF INFORMATION

All proposals and associated information submitted to The Neighbourhood Group shall become the property of The Neighbourhood Group, and shall be subject to Freedom of Information legislation.

1.14 CONTRACT DOCUMENTS AND ORDER OF PRECEDENCE

The contract shall consist of the following documents and, in the event of a conflict between them, the order of precedence, notwithstanding the chronological order in which they are issued or executed, shall be as follows:

- i. The executed Agreement/Purchase Order;
- ii. Addenda to the RFP and any subsequent negotiated changes;
- iii. Request for Proposal Document and all attachments; and
- iv. The Vendor's proposal

PART 2 – PROJECT DESCRIPTION AND DELIVERABLES

2.1 COMPANY DESCRIPTION

The Neighbourhood Group, an amalgamation of Central Neighbourhood House (founded in 1911), Neighbourhood Link Support Services (founded in 1975) and St. Stephen's Community House (founded in 1962), helps over 60,000 vulnerable people by delivering programs and services that create opportunities to improve and enhance people's lives and help them to live independently and with dignity in the community.

With 700 employees, 2,100 volunteers and a \$48M budget, The Neighbourhood Group serves some of our city's most at-risk groups including frail seniors, adults living with disabilities, low income children, youth and their families, newcomers to Canada, people who are homeless or precariously housed, and those searching for employment.

The Neighbourhood Group takes both local and city-wide perspectives with 30 locations in several "Neighbourhood Improvement Areas" and several of the most high-density and high-population-growth neighbourhoods in the city. We have locations in the East and West, and in the North and South of the city.

2.2 PROJECT BACKGROUND

The Neighbourhood Group is seeking a consultant for work over a period of two years to fulfill the key objectives outlined in Section 2.3 with core support and the active involvement of senior leaders of the organization.

2.3 SCOPE OF SERVICES AND KEY DELIVERABLES

Our goal in engaging an Equity Consultant is to support The Neighborhood Group in ensuring that the principals of equity, anti-racism, anti-colonialism are integrated across the organization and within our policies and practices. Key deliverables include:

- *Complete an organizational equity audit with internal and external supports resulting in a sustainable action plan, which the organization will implement in the timeframe of 2020-2022*

The consultant will establish the tools best suited to an effective equity audit for an organization of this size and range of services, which will include but not be limited to, a fulsome review of policies and procedures, equity survey of Board, staff and management assessing agency-wide systems and institutional working culture, assessment of various systems of operations including but not limited to: HR (recruitment, hiring, retention, promotion, compensation), Board bylaw review, finance, strategic directions, governance, programs and client-facing experience, social media presence, external communications presence and marketing materials.

This process will result in a comprehensive written report of the audit detailing its process, key themes, and analysis of the gaps and disconnects between the current and future/desired state of the organization, and opportunities to build upon. The report should include recommendations for embedding new inclusive policies and practices into the organization's culture and into all function areas of the organization, including achievable short-term action steps and sustainable, long-term goals.

- *Provide leadership to the development of new functions that ensure The Neighbourhood Group continues to strengthen its commitment, practice and effectiveness in fulfilling its mission of ensuring social and economic justice for all.*

The consultant will work with existing relevant committees within the organization (Truth and Reconciliation, Anti-Oppression, Program Quality, Advocacy), the Board of Directors, senior management, and staff leaders in developing new functions and structure that improve equity across the organization, and will follow-up on previously gathered recommendations from BIPOC staff internal calls to action on anti-black racism and anti-colonialism, including but not limited to:

- Assist in leading the revision of our mission statement and create a statement of corporate responsibility for equity
- Assess portfolio of programming and create strategies on ensuring equitable, relevant and effective services to racialized communities in Toronto
- Review complaint processes to create safety and use a restorative justice approach and create the development of an accountability process/committee to hold the agency and staff accountable
- Develop ongoing anti-racism/anti-oppression/equity training system that is included in training and practice for all staff
- Develop stronger public advocacy stance and presence in support of anti-black racism and anti-colonial movements externally

This work is to be completed by October 28th, 2022 and will include an audit phase and an implementation phase.

2.4 SCOPE

The Neighbourhood Group anticipates that to complete the deliverables outlined in Section 2.3, the selected Vendor will need to work with The Neighbourhood Group Board of Directors, management team and front-line staff. The scope of this work will engage the full organization as well as:

- Policies and Procedures renewal
- External programming design
- Communications frameworks
- Training and Development delivery

Important Note: It is important to note that the vendor will not work in isolation, but will be imbedded within the Senior Management Team, of which each senior team member will be supporting the audit and the implementation of each equity function as a core responsibility.

PART 3 – EVALUATION PROCESS: SUBMISSION INSTRUCTIONS, AND EVALUATION CRITERIA

Vendors' proposals are to be based solely on the criteria described below and any Amendments/Addenda issued thereto. Vendors are advised to present the requested information clearly and concisely. The information should be relevant and given in context to this particular project with demonstration of a clear understanding of The Neighbourhood Group's requirements. Failure to provide the requested information may result in rejection of the proposal. Evaluations will be based on the criteria identified in the balance of this section.

3.1 Evaluation Overview

The Neighbourhood Group will select at most the top five proposals and will conduct the evaluation of proposals in the manner detailed below.

All scores will be added and, subject to satisfactory reference checks (including discovered and internal references, if any) and the express and implied rights of The Neighbourhood Group, the top candidates will be selected and may be invited for an interview. The Neighbourhood Group reserves the right to adjust scores based on result of the reference checks and interview. The following table summarizes the evaluation process:

Scoring Component	Weight as % of Combined Rated score
Vendor Team Qualifications and/or depth of relevant experience	30%
Evaluation of completed similar or comparable work	20%
Relevancy of skills and experience based in equity professional practice that sets Vendors apart from competition	30%
Pricing	20%
TOTAL	100 %

3.2 Mandatory Submission Requirements

Proposals that do not comply with all of the mandatory requirements including incomplete or late submissions, will, subject to the express and implied rights of The Neighbourhood Group, be disqualified and not evaluated further.

All proposals must include:

1. Mandatory Response Submission Form (Appendix A)
2. Pricing Submission Form (Appendix B)
3. Conflict of Interest / Unfair Advantage Declaration (Appendix C)
4. Reference Form (Appendix D)
5. Project Schedule (as detailed in Section 3.3.2)

With all forms completed and signed by the vendor where applicable.

3.3 Written Rated Evaluation Criteria

The Evaluation Team will score each qualified Proposal on the basis of the rated requirements. Vendors are advised to present the requested information clearly and concisely. The information should be relevant and given in context to this particular project proposal. Vendors should also note and provide detail about any part of their proposal that does not meet one or more of the stated requirements.

3.3.1 Company Overview and Understanding of Requirements

The Vendor should demonstrate an understanding of the requirements by describing how the Vendor will deliver the services outlined in Section 2 of this RFP. This

description should include, but not be limited to, the information in the scoring table.

3.3.2 Project Schedule

The Vendor should provide a project schedule demonstrating understanding of The Neighbourhood Group’s timeline. The project schedule should include all activities, milestones, and timelines for the completion of deliverables outlined in Section 2.

It should be noted that the number of work days and/or hours in the Project Schedule is expected to match with the costing information provided by the Vendor as part of Appendix B.

3.4 In-person Interview

An in-person interview may be conducted for the purpose of learning more about a Vendor’s a) relevant work experience including the Vendor providing examples of feasibility studies it has completed, b) unique skills and experience that sets the Vendor apart from its competition.

3.5 Pricing Evaluation

Pricing will be scored based on a relative pricing formula using the Total Fees price set out in the Appendix B Pricing Submission Form. The pricing evaluation shall be scored based on a relative pricing formula where each Vendor shall receive a percentage by dividing that Vendor’s total price into the lowest bid total price. Vendors are to include all costs associated with their proposal including a current schedule of rates and the perceived costs of service delivery based on the project plan and team outlined herein. Vendors have the option to provide the breakdown of pricing applicable for the solution. Please refer to Section 3.2 to ensure pricing is compliant to guidelines in the Pricing Submission Form (Appendix B).

For Example:

Pricing Evaluation Example Only

Calculation			
Price Bid score (Proposal “X”) = (Lowest Total Price / Total Price for Proposal “X”) x 30, rounded up or down to the 4 th decimal place.			
Example Calculation			
Two (2) Proposals are being considered with the following total prices: P1: \$1,000 P2: \$2,000			
The lowest Total Fees Price for the two (2) Proposals is \$1,000 (i.e., P1).			
The points awarded to each Proposal would be calculated in the manner set out below:			
Proposal	Total Fees Price	Calculation	Price Bid Score
P1	\$1000	(1000/1000) x 30, rounded	30
P2	\$2000	(1000/2000) x 30, rounded	15

Upon completion of the pricing evaluation, the score from the pricing stage will be added to the scores for the other criteria for each qualified Vendor. The resultant highest total scoring qualified Vendor will be selected as the successful Vendor.

4.6 Tie-Breaker

In the event that there is a tie in the final scores, the Vendor with the highest score in the evaluation criteria will be selected as the successful Vendor, in the following order:

1. Evaluation of completed similar work and previous customer satisfaction
2. Vendor Team Qualifications
3. Unique skills and/or experience that sets Vendors apart from competition
4. Price

4.7 References

The Neighbourhood Group reserves the right to contact any or all project references indicated in the Vendor's submission and to use this information in the evaluation and scoring of submissions.

4.8 SUBMISSION INSTRUCTIONS

Proposals must be submitted by **either** of the following methods:

(a) Email:

The Vendor must submit **one (1) signed** proposal by an authorized representative in either Microsoft Word or PDF format to the RFP Contact. Appendix B should be completed and submitted as a **separate attachment**.

RFP Contact:

Amanda Bland, Executive Assistant
The Neighbourhood Group
execassistant@sscto.ca

(b) E-tendering Websites:

The Vendor must submit **one (1) signed** proposal by an authorized representative in PDF format (unlocked, no passwords installed) to the public e-tendering website where this RFP was posted. As per the e-tendering website and the requirements of this RFP, Appendix B should be completed and submitted as a separate attachment.

APPENDIX A – RESPONSE SUBMISSION FORM
(To be submitted on vendor letterhead with the proposal)

Vendor Information

Please fill out the following form, and name one person to be the contact for this RFP response.	
Full Legal Name of Vendor:	
Any Other Relevant Name Under Which the Vendor Carries on Business:	
Street Address:	
City, Province/State:	
Postal Code:	
Phone Number:	
Company Website (If Any):	
RFP Contact Person and Title:	
RFP Contact Phone:	
RFP Contact E-mail:	

Please check:

I/We hereby acknowledge receipt of Addendum nos. ____ through to ____ inclusive.

I/We the undersigned, having carefully examined, understood and agreed with the Procurement documents, specifications, and terms and conditions attached to and forming part of the Proposal, hereby accept without change or reservation and agree to be bound by said Proposal for The Neighbourhood Group “RFP Call” and all other works pertinent thereto.

I/We DECLARE that

1. no person, other than the one whose signature or the signature of proper officers and seal is or are attached has any interest in this bid response or in the proposed contract;
2. the individuals executing this document on behalf of the Vendor are duly authorized signing officers capable of binding the Vendor;
3. this proposal is made without any connection, knowledge, comparison of figures or arrangements with any other person making a response for the same work and is in all respects fair and without collusion or fraud;
4. no attempt has been made, nor will be made, to induce any other person to submit, or not to submit, a proposal, for the purposes of restricting competition;

5. the prices in this proposal have not been knowingly disclosed by the Vendor, and will not knowingly be disclosed by the Vendor prior to award, directly or indirectly, to any other Vendor or competitor;
6. no member of the existing Board or Officer of The Neighbourhood Group, or any proposed member or Officer of The Neighbourhood Group is, or will become interested directly or indirectly in the performance of the contract, or in matters to which it relates, or of any supplies to be used therein, or in any of the monies to be derived therefrom;
7. the matters stated in this response are in all respects true;
8. I/We AGREE that this offer is to remain open for acceptance until the formal contract is executed by the successful Vendor for the said deliverables or for a minimum period of sixty (60) days, whichever event first occurs and that The Neighbourhood Group may at any time within that period, without notice, accept this bid response whether or not any other proposal has been previously accepted;
9. I/We AGREE to any reasonable extension of the sixty (60) days offer validity period should an extension become necessary;
10. I/We AGREE to supply all goods and services in accordance with all Terms and Conditions and Specifications as provided in this procurement document; and
11. I/We AGREE to negotiate with The Neighbourhood Group any change in sums payable as included in the Appendix B - Pricing Form, resulting from any additions and/or deletions.

Signature of Witness

Signature of Vendor Representative

Name of Witness

Name and Title of Vendor Representative

Date:

I have authority to bind the Vendor

APPENDIX B – PRICING FORM

Vendors shall submit a separate copy (attachment) of their Pricing Form Proposal for the required Deliverables. The Pricing Form shall be clearly marked as **Appendix B – Pricing Form**.

As outlined in this RFP, Vendors must include the overall cost, and a breakdown of the per diem rate for different team members, to meet the required deliverables and should provide a clear outline of costs (e.g., an itemized list) of their proposal.

Pricing must include all expenses, disbursements, payment terms and Harmonized Sales Tax (HST).

APPENDIX C – CONFLICT OF INTEREST/UNFAIR ADVANTAGE DECLARATION
(To be submitted on vendor letterhead with the proposal)

In order to be considered for a contract award, Vendors must submit the following statement and information regarding conflict of interest:

I/We hereby certify that the preparation and submission of this response to (TNG-09-2020-DC003) by _____ (Vendor company name), its employees, agents and advisors was done in the absence of any conflict of interest or unfair advantage of those so involved.

I/We further confirm that _____ (Vendor company name) has not knowingly hired or retained the services of any employee or former employee of The Neighbourhood Group, where in doing so such employee or former employee is in breach of a Conflict of Interest Policy or separation agreement.

Principals of Vendor

Name	Address	Telephone
_____	_____	_____
_____	_____	_____

Proposed Participants from Vendor

Name	Address	Telephone
_____	_____	_____
_____	_____	_____
_____	_____	_____

Dated at _____ this _____ day of _____, 2020.

(Signed – Original Signature)

(Authorized Signing Officer Name - Print)

(Title)

APPENDIX D – REFERENCES

CLIENT REFERENCES	
Please provide details of two (2) references to whom you have provided similar services within the past five (5) years, and provide as much of the following information as possible for each client.	
Reference 1:	
Client's name	
Client's address	
Client Contact name	
Contact's title/function	
Contact's telephone number	
Contact's email	
Type of service / project implemented	
Brief description of project (must have been completed within previous five (5) years):	
Reference 2:	
Client's name	
Client's address	
Client Contact name	
Contact's title/function	
Contact's telephone number	
Contact's email	
Type of service / project implemented	
Brief description of project (must have been completed within previous five (5) years):	