



**The Neighbourhood Group**

**Request for Proposal (RFP)  
for Change Management and  
Team Building Consultant**

**Request for Proposal (RFP) Number: TNG-10 2020 DC004**

**Issue Date: October 16, 2020**

## **IMPORTANT DATES**

Issue Date of RFP	October 16, 2020
Bid Submission Date	November 6, 2020

## **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 act as Consultant for Change Management and Team Building initiatives.

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.

This invitation is a limited competition as it is expected to have a total value less than \$100,000.

### **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.

### **1.3 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 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.

## **1.8 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.

## **1.10 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.

## **1.11 PRIVACY**

### **1.11.1 Privacy**

The successful Vendor must comply with any applicable privacy legislation and with The Neighbourhood Group's privacy policies and practices.

### **1.11.2 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.

## **1.12 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.

## **1.13 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
- ii. RFP Document; and
- iii. 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 55,000 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, 2,200 volunteers and a \$48M budget, The Neighbourhood Group serves some of our city's most at-risk groups including frail seniors, low income families, adults living with a disability, newcomers to Canada, people who are homeless and people seeking employment.

### **2.2 PROJECT BACKGROUND**

The Neighbourhood Group has been in existence since 2014, when Central Neighbourhood House and Neighbourhood Link Support Services amalgamated. In April 2020, St. Stephen's Community House joined The Neighbourhood Group.

The vision behind the formation of The Neighbourhood Group was to create a stronger, more sustainable organization by bringing together agencies to deliver quality programs and services, support innovation, community engagement, advocacy and above all, to best serve the most vulnerable people in communities across our City. The Neighbourhood Group preserves the history and brand of each organization that has joined the Group. The Neighbourhood Group is a unionized environment with CUPE.

### **2.3 SCOPE OF SERVICES AND KEY DELIVERABLES**

The Neighbourhood Group requires a consultant who can support the Agency as we navigate through the process of change management and building of new teams, relationships and intersections generated by the very recent April 1, 2020 merger of The Neighbourhood Group and St. Stephen's Community House.

Requirements include:

- Complete an assessment of current state vs. desired state
- Analyze staff and management structures developed to date from the merger
- Train stakeholders on the potential negative impacts of change and how to limit and overcome them
- Provide communication materials on a context for change and shared language to embrace and leverage change
- Create and train stakeholders in Change Management skills for success – from

- enhancement to mastery
- Provide coaching, facilitation, tools, training, development, support
- Support team collaboration
- Develop a plan going forward to support ongoing change management learning
- Provide effective integration tools and methodology to build resilient, flexible, collaborative, innovative teams after end of project
- Provide a final report to the Board of Directors Integration Task Force

The Neighbourhood Group estimates that the Vendor will complete these deliverables by June 30, 2021.

The Neighbourhood Group anticipates that to complete these deliverables the selected Vendor will need to work with The Neighbourhood Group Board of Directors and committees, CEO, senior management team, management team, human resources team, CUPE leadership, and employees in one-on-ones, small groups and large groups forums.

### **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 The Neighbourhood Group reserves the right to adjust scores based on result of the reference checks and/or interview. The following table summarizes the evaluation process:

<b>Scoring Component</b>	<b>Weight as % of Combined Rated score</b>
Vendor Team Qualifications	20%
Evaluation of completed similar work with non-profit organizations and	50%
Unique skills and/or experience that sets Vendors apart from competition	10%
Pricing	20%
<b>TOTAL</b>	<b>100 %</b>

#### **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. 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. Price
3. Vendor Team Qualifications
4. Unique skills and/or experience that sets Vendors apart from competition

### **3.5. 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.

### 3.6. 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.

**RFP Contact:**

Sheri Ellis, Vice President, People, Talent and Culture  
The Neighbourhood Group  
**sellis@tngcs.org**

**APPENDIX A – RESPONSE SUBMISSION FORM**

**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.

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Signature of Witness

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Signature of Vendor Representative

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Name of Witness

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Name and Title

Date:

I have authority to bind the Vendor

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## **APPENDIX B – PRICING FORM**

Vendors shall submit 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 completed and submitted with 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-\_\_\_\_\_) 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 <b>two (2) references</b> 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.	
<b>Reference 1:</b>	
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:	
<b>Reference 2:</b>	
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:	