

Indigenous Diabetes Health Circle

# Organizational Services Review RFP: HR, Finance & Communication Strategy

APRIL 16, 2018



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## A. RFP SUMMARY

<b>Scope of Service</b>	Organizational Services Review: HR, Finance and Communication Strategy		
<b>RFP #</b>	<b>2018RFP-01</b>		
<b>RFP Issued By</b>	Indigenous Diabetes Health Circle (IDHC)		
<b>Issue date</b>	<b>April 16, 2018</b>		
<b>Closing Date/Time</b>	Proposals must be received before 16:00 hours (4:00 pm) Easter Standard Time on: <b>May 02, 2018</b> <b>NO LATE PROPOSALS WILL BE ACCEPTED.</b>		
<b>IDHC Contact Information and Questions</b>	All enquiries related to this RFP including any requests for information, questions, and clarification, are to be directed to the following email address: <a href="mailto:executivedirector@idhc.life">executivedirector@idhc.life</a> .  The IDHC will respond if time permits. Information obtained from any other source is not official and should not be relied upon. Enquiries and any responses will be recorded and may be distributed to all Proponents at the IDHC's option.		
<b>Delivery of Proposals</b>	A PDF copy of your proposal must be delivered via email to:  <b>Indigenous Diabetes Health Circle (IDHC)</b> <b>Attention: Executive Director</b> <b>3250 Schmon Parkway, Unit 1B</b> <b>Thorold, ON, L2V 4Y6</b>  <b>RE: 2018RFP-01</b>  Proposal envelopes should be clearly marked with the name and the address of the proponent, the RFP number and the RFP project name. Proposals <b>may not</b> be sent by regular mail, facsimile or in person. <b>NO LATE PROPOSALS WILL BE ACCEPTED.</b>		
<b>Short Listed Proponents</b>	For those Proponents which <b>have not</b> been contacted by end of business day on <b>May 22, 2018</b> , will serve as notice that their proposal submission was unsuccessful.		
<b>Successful Proponent Notified</b>	<b>May 22, 2018</b>	<b>Expected Start Date of Project:</b> <b>June 04, 2018</b>	<b>Expected End Date of Project:</b> <b>September 10, 2018</b>
<b>Proponent's Submissions</b>	A person authorized to sign on behalf of the proponent must complete and sign the <b>Proponent Section</b> (below), leaving the rest of this page otherwise unaltered and include the originally-signed and completed page with the proposal.		
<p><b>Proponent Section</b> <b>To be completed by Proponent and included as the "cover page" of the Proponents Response</b></p> <p>The enclosed proposal is for the following services (please check the services you are submitting this proposal for):</p> <p style="text-align: center;"> <input type="checkbox"/> Human Resource      <input type="checkbox"/> Finance      <input type="checkbox"/> Communications Strategy (Internal &amp; External) </p> <p>The enclosed proposal is submitted in response to the above-referenced RFP including any addenda. Through submission of this proposal we agree to all of the terms and conditions of this RFP and agree that any inconsistencies in our proposal will not be considered. We have carefully read and examined the RFP including the Administrative Section and have conducted such other investigations as were prudent and reasonable in preparing the proposal. We agree to be bound by the statements and representations made in our proposal.</p>			
Signature of Authorized Representative:		Legal Name of Proponent (and Doing Business As Name, if applicable):	
Printed Name of Authorized Representative:		Address of Proponent:	
Title:			
Date:			
Authorized Representative email address (if available):		Authorized Representative phone, fax (if available):	

## **B. SUMMARY OF REQUIREMENTS**

The Indigenous Diabetes Health Circle (IDHC) requires the services of a Consultant/s to conduct a review and provide recommendations for the following IDHC functions:

- Human Resources
- Finance
- Communication Strategy – Internal & External

The terms and conditions applicable to this RFP are identified in Appendix A – Definitions and Administrative Requirements. Submission of a proposal in response to this RFP indicates acceptance of all terms and conditions that are included in Appendix A, and any addenda subsequently issued by the IDHC. Provisions in proposals that contradict any of the terms of this RFP will not be considered.

## **C. BACKGROUND**

### **WHO WE ARE**

The Indigenous Diabetes Health Circle (“IDHC”) incorporated in 1997 and is a not-for-profit organization that plays a unique role in Ontario’s Indigenous diabetes healthcare sector. The IDHC leads the development and coordination of holistic and cultural diabetic healing practices in Ontario. This includes the development of standards and methodologies that incorporate the body, mind and spirit of our clientele and their family, restoring balance so they can increase their understanding of the disease, make informed decisions and self-manage their lives.

Working with our partners, we help improve the depth and breadth of Indigenous diabetes health by building and maintaining critical partnerships. We provide a variety of wellness programs that strive to reduce the impact of diabetes on our People.

We are funded by the Ontario Ministry of Health and Long-Term Care (MOHLTC) and our work is supported by the Independent First Nations of Ontario and is guided by a Board of Directors comprised of representatives from the following 5 Ontario Indigenous organizations:

- Association of Iroquois and Allied Indians,
- Métis Nation of Ontario,
- Ontario Federation of Indigenous Friendship Centres,
- Ontario Native Women’s Association and the Union of Indians, and the
- Union of Ontario Indians.

The IDHC has over 20 employees, a combination of contract and permanent.

### **VISION**

Indigenous peoples have the tools, knowledge and ability to make healthy choices and live free of diabetes, now and in future generations.

## MISSION

The IDHC will achieve the vision by supporting Indigenous communities, families and individuals by:

- Promoting holistic wellness models;
- Building on traditional teachings & best practices to develop and provide programs, education & resources; and
- Building relationships & community capacity.

## VALUES

In the pursuit of our Mission and Vision the IDHC values:

- Respect for autonomy and diversity;
- Community based and responsive services;
- Holistic wellness (body, mind and spirit);
- A spirit of sharing and cooperation, and
- Personal choice and the right to privacy.

## OFFICE LOCATIONS

Program	Location
<b>Head Office - Administration</b>	3250 Schmon Parkway, Unit 1B Thorold ON L2V 4Y6 www.idhc.life
<b>SPIRIT ~ Diabetes Wellness</b>	Native Women's Centre 21 Rosedene Ave Hamilton ON L9A 4W3
	Six Nations of Grand River Territory 1721 Chiefswood Road Iroquois Village Plaza Ohsweken ON N0A 1M0
	Barrie Area Native Advisory Circle 64 Cedar Pointe Drive, Unit 1405 Barrie ON L4N 5R
	Curve Lake First Nation 873 Mississauga St. Curve Lake First Nation ON K0L 1R0
<b>BODY ~ Circle of Care</b>	1188 St. Jerome Street, Unit 107 Sudbury ON P3A 2V9
	3250 Schmon Parkway, Unit 1B Thorold ON L2V 4Y6
<b>MIND ~ Traditional Knowledge</b>	3250 Schmon Parkway, Unit 1B Thorold ON L2V 4Y6

## D. SCOPE OF WORK

The IDHC intends to source a consulting firm/s experienced in assessing the effectiveness of the following 3 service functions:

- **Human Resources**
- **Finance**
- **Communication Strategy – Internal & External**

***Vendors may choose to respond to one or more of the IDHC service functions.***

The IDHC has experienced substantial growth in people and locations over the last several years, which has placed pressure on the organization's internal structure. The IDHC is looking to reassess and re-evaluate the HR, finance and communication strategy functions as it moves forward. It is important as an organization funded by the Ministry of Health and Long-Term Care (MOHLTC) that process and practices are based on best practice, are fair and transparent.

The work being undertaken will need to ensure the IDHC HR and finance service functions are structured and resourced to:

- Meet IDHC operational requirements
- Improve efficiency, effectiveness and staff experience

Structures and systems recommended must consider and incorporate, if applicable, a foundation of Indigenous traditional knowledge including cultural values, principles, virtues and ways of helping each other.

The services of the consultant/s will review the internal HR and finance service functions and the internal and external communication strategy service functions and recommend changes to improve efficiency, effectiveness and accountability.

- a. Assess the current structure for HR, finance and communication strategy (including providing a list of current services provided for each function) service functions.
- b. Benchmark the HR, finance and communication strategy service functions against comparable organizations to identify best practices that could be adopted.
- c. Assess staffing levels based on current and future requirements (including experience requirements for future hiring's).
- d. Identify strengths and weaknesses of current HR, finance and communication strategy service functions including root causes behind current successes or challenges that could influence capacity to achieve growth.
- e. Clarify reporting relationships, level of authority, decision-making processes and roles and responsibilities.
- f. Recommendations and options to build current and future internal capacity, efficiency and effectiveness of HR, finance and communication strategy functions.

All aspects of this project will report to the Executive Director or their designate.

## **E. DELIVERABLES**

The deliverable from this project is a recommended plan for the following IDHC service functions:

- **Human Resources**
- **Finance**
- **Communication Strategy – Internal & External**

The plan must meet the scope of work listed above and be sufficiently detailed and costed to provide clear guidance and ability to evaluate the implementation. The action plan must be achievable within the IDHC's timeframe, and list immediate, short, medium and long-term timelines that indicate accountabilities, recognize IDHC priorities and constraints.

Presentation to the IDHC leadership and/or board of directors along with a PDF electronic copy of the report is required.

## **F. FINANCIAL CONSIDERATIONS**

Proposals must include proposed costs to complete the tasks described in the scope of work and deliverables. Separate pricing and timelines is to be listed for each of the IDHC service functions:

- **Human Resources**
- **Finance**
- **Communications – Internal & External**

The proposed cost is to include any travel related costs and any disbursements, and key personnel involved in the project as well as a projected time frame for completion. Direct expenses are to be billed at actual cost.

## **G. VENDOR QUALIFICATIONS**

Vendors should provide the following items as part of their proposal for consideration:

- Description of the consulting company and each individual team member related to:
  - Anticipated staff you will assign to this project (total number, number of days/hours assigned, role, title, fees)
  - Education, demonstrated abilities and experience in organizational review; organizational design and development; policy development; preferably within an Indigenous setting.
  - Completed relevant consulting projects.
  - History of team members working together on a similar project.
- Experience in working with Indigenous clients.
- Frequency of visits to IDHC office for face to face meeting opportunities.

- Schedule for completion of the project.
- Project management methodology.
- One or two reports completed by the company on similar projects within the past 5 years – Indigenous clients preferred.
- Two relevant client references – 1 must be an Indigenous client.

## H. PROPOSAL FORMAT

The following format, sequence, and instructions should be followed in order to provide consistency in a Vendor’s response and to ensure that each proposal receives full consideration.

### **NOTE:**

- Vendors ***must*** indicate on the RFP cover sheet (page 4) the service function/s (HR, Finance & Communications Strategy - internal & external) for which they are submitting a proposal;
- Vendors ***may*** submit a separate proposal for EACH service OR submit ONE proposal for ALL the services they are responding to;
- Proposals with more than one service submission are to have clearly delineated service function headings – **HR, Finance & Communications Strategy** - internal & external

All pages must be consecutively numbered. The proposal must include:

- One (1) unaltered and completed Request for Proposals cover page, including Proponent Section completed in original form as per instructions; and a
- Table of contents including page numbers; and
- A short (one or two pages) executive summary of the key features of the proposal including the Vendor’s understanding of the project; and
- The body of the proposal, including pricing, i.e. the “Proponent Response”; and
- A detailed description of all costs associated with the requirements listed in this RFP.

## I. PROPOSAL SUBMISSION

The proposal must be:

- Suitable for printing;
- Line Spacing of no more than 1.5;
- Formatted for letter size 8.5 inch x 11 inch paper;
- Minimum of 12-point font;
- An electronically submitted copy is defined as a portable document format (PDF) version that is Adobe Acrobat Reader compliant. Other file formats will not be accepted; and be
- Submitted electronically by via e-mail to:

**Attention:** Executive Director  
**Email Address:** [executivedirector@idhc.life](mailto:executivedirector@idhc.life)

## J. PROPOSAL EVALUATION

The IDHC reserves the right to reject or accept any or all proposals. Vendors may be eliminated from consideration for failure to comply with the specifications of the RFP. Submissions to the request for proposal not containing the required information may be excluded from the evaluation process.

EVALUATION CRITERIA	POINTS
<b>Proposal:</b> <ul style="list-style-type: none"> <li>• Overall proposal completeness &amp; suitability - presented in a clear &amp; organized manner.</li> </ul>	5
<b>Proposed Work Plan:</b> <ul style="list-style-type: none"> <li>• Demonstrated understanding of the project objective and scope</li> <li>• Proposed approach &amp; methodology to conduct the work</li> <li>• Proposed schedule to conduct &amp; complete the work</li> </ul>	25
<b>Proposed Staff:</b> <ul style="list-style-type: none"> <li>• Project Manager qualifications, experience, demonstrated understanding of project</li> <li>• Key personnel qualifications, experience, demonstrated understanding of project</li> </ul>	20
<b>Vendor Profile:</b> <ul style="list-style-type: none"> <li>• Vendor information demonstrating capacity to complete the work</li> <li>• Experience and reputation of the vendor with similar studies/projects</li> </ul>	10
<b>Cultural Competency:</b> <ul style="list-style-type: none"> <li>• Demonstration of cultural competency, &amp; experience working with Indigenous organizations/communities.</li> </ul>	10
<b>Value, Cost &amp; Fees</b>	15
<b>References</b>	15

## K. GENERAL CONDITIONS

The IDHC reserves the right to:

- Reject any or all proposals,
- Suspend or cancel the RFP at any time for any reason without penalty,
- Not necessarily accept the lowest cost proposal,
- Accept any proposal which it may consider being in the best interest of the IDHC,
- Waive formality, informality or technicality in negotiating a satisfactory proposal.

All proposal submissions are valid for 120 days and will be evaluated using the evaluation criteria contained in this RFP and the project will be awarded to the vendor judged to provide the best overall value to the IDHC.

All firms responding to the RFP will be notified via email regarding the awarding of the project.

The successful vendor will be required to enter into a formal agreement/contract with the IDHC.

The successful vendor will be required to acknowledge and adhere to any IDHC policies or bylaws and abide by all Provincial and Federal regulations, acts or legislation requirements.

The successful vendor will be required to provide appropriate insurance coverage at time of contract execution.

All expenses incurred in the preparation and presentation of the response to the RFP is entirely the responsibility of the vendor.

The IDHC will not accept liability for any late, lost, or improperly delivered emails. We recommend that you contact the IDHC to verify successful delivery of your email proposal.

IDHC procurement activities will be governed to ensure all vendors are treated fairly and have equal access to procurement activities; to the extent possible preference in awarding contracts will be given to Indigenous organizations and/or Indigenous individuals.

## **L. AGREEMENT**

The IDHC reserves the right to enter into an agreement for only portions of the services contemplated by the proposals with one or more of the Vendor(s).

After the selection of the successful Vendor(s), a formal written agreement will be prepared and will not be binding until it has been approved by the IDHC and signed by both parties.

The Agreement will contain the relevant provisions of this RFP, the accepted proposal, as well as such other terms as may be mutually agreed upon, whether arising from the accepted proposal or as a result of any negotiations prior or subsequent thereof.

## **APPENDIX A**

### **Definitions and Administrative Requirements**

#### **1. Throughout this RFP the following definitions apply:**

- a. “Contract” means the written agreement resulting from this Request for Proposal executed by the IDHC and the Vendor;
- b. “Contractor” means the successful proponent to this Request for Proposals who enters into a written Contract with the IDHC;
- c. “the IDHC” means the Indigenous Diabetes Health Circle;
- d. “must” or “mandatory” means a requirement that must be met in order for a proposal to receive consideration;
- e. “Proponent” or “Vendor” means an individual or a company that submits, or intends to submit, a proposal in response to this Request for Proposal;
- f. “Request for Proposal” or “RFP” means the process described in this document; and
- g. “Should” or “desirable” means a requirement having a significant degree of importance to the objectives of the Request for Proposal.

#### **2. Terms and Conditions:**

The following terms and conditions will apply to this RFP. Submission of a proposal in response to this RFP indicates acceptance of all terms that follow and that are included in any addenda issued by the IDHC. Provisions in proposals that contradict any of the terms of this RFP will be excluded.

#### **3. Late Proposals**

Proposals will be marked with their receipt time at the IDHC location. Only complete proposals received and marked before closing time will be considered to have been received on time. Late proposals will not be accepted and will be returned to the Proponent. In the event of a dispute, the proposal receipt time as recorded by the IDHC shall prevail.

#### **4. Eligibility**

Proposals may not be evaluated if the current or past activities or interests of the Proponent, or any sub-contractors proposed by the Proponent, may, in the IDHC’s opinion, give rise to an unresolved conflict of interest in connection with the project described in this RFP. This includes but is not limited to, involvement by a Proponent or any proposed sub-contractors in the preparation of this RFP. If a Proponent is in doubt as to whether there might be a conflict of interest, the Proponent should consult with the IDHC Contact Person identified in this RFP.

Proposals from not-for-profit agencies will be evaluated against the same criteria as those received from any other Proponents.

## **5. Evaluation**

Evaluation of proposals will be by a committee formed by the IDHC and may include employees and contractors of the IDHC. All personnel will be bound by the same standards of confidentiality. The IDHC's intent is to enter into a Contract with the Proponent who has the highest overall ranking based upon such an evaluation.

## **6. Acceptance of Proposals**

This RFP should not be construed as an agreement to purchase goods or services. The IDHC is not bound to enter into a Contract with the Proponent who submits the lowest priced proposal, or with any Proponent. Proposals will be assessed in light of the evaluation criteria. The IDHC will be under no obligation to receive further information, whether written or oral, from any Proponent.

Neither acceptance of a proposal nor execution of a Contract will constitute approval by the IDHC of any activity contemplated in any proposal that requires any approval, permit, or license pursuant to any federal, provincial, regional district or municipal statute, regulation or by-law.

## **7. Proposal Validity**

Proposals will be open for acceptance for at least 120 days after the closing date.

## **8. Sub-Contracting**

The use of a sub-contractor must be clearly defined in the proposal. This includes a joint submission by two Proponents having no formal corporate links. In such a case, one of the Proponents must be prepared to take overall responsibility for successful performance of the Contract and this must be clearly defined in the proposal.

Where applicable, the names of approved sub-contractors listed in the proposal will be included in the Contract. No additional sub-contractors will be added nor other changes made, to this list in the Contract without the written consent of the IDHC.

## **9. Modification of Terms**

The IDHC reserves the right to modify the terms of this RFP at any time in its sole discretion. This includes the right to cancel this RFP at any time prior to entering into a Contract with the successful Proponent.

## **10. No Lobbying**

Proponents must not attempt to communicate directly or indirectly with any employee, contractor or representative of the IDHC, including the evaluation committee and any officials of the IDHC, or with members of the public or the media, about the project described in this RFP or otherwise in respect of the RFP, other than as expressly directed or permitted by the IDHC.

## **11. Limitation of Damages**

Further to the preceding paragraph, by submitting a proposal, the Proponent agrees that it

will not claim damages for whatever reason relating to the Contract or in respect of the competitive process, in excess of an amount equivalent to the reasonable costs incurred by the Proponent in preparing its proposal. Furthermore, by submitting a proposal the proponent further agrees to and hereby waives any claim for damages, loss of profits or loss of opportunity if no contract is made between IDHC and the proponent for any reason.

## **12. Liability for Errors**

While the IDHC has used considerable efforts to ensure information in this RFP is accurate, the information contained in this RFP is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the IDHC, nor is it necessarily comprehensive or exhaustive. Nothing in this RFP is intended to relieve Proponents from the responsibility of conducting their own investigations and research and forming their own opinions and conclusions with respect to the matters addressed in the RFP. Proponents will be solely responsible to ensure their proposal meets all requirements of the RFP, to advise the IDHC immediately of any apparent discrepancies or errors in the RFP, and to request clarification if in doubt concerning the meaning or intent of anything in the RFP.

## **13. Proponent's Expenses**

Proponents are solely responsible for their own expenses in preparing a proposal and for subsequent negotiations with the IDHC, if any. If the IDHC elects to reject all proposals, the IDHC will not be liable to any Proponent for any claims, whether for costs or damages incurred by the Proponent in preparing its proposal, loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

## **14. Collection and Use of Personal Information**

Proponents are solely responsible for familiarizing themselves, and ensuring that they comply, with the laws applicable to the collection and dissemination of information, including resumes and other personal information concerning employees and employees of any sub-contractors. If this RFP requires Proponents to provide the IDHC with personal information of employees who have been included as resources in response to this RFP, Proponents will ensure that they have obtained written consent from each of those employees before forwarding such personal information to the IDHC.

## **15. Use of RFP**

Any portion of this document or any information supplied by the IDHC in relation to this RFP may not be used or disclosed for any purpose other than for the submission of proposals. Without limiting the generality of the foregoing, by submitting a proposal, the Proponent agrees to hold in confidence all information supplied by the IDHC in relation to this RFP.

## **16. Contract Negotiation and Award**

Following the evaluation and recommendation of the Evaluation Committee, the IDHC may select one or more Proponents to enter into negotiations for a Contract or Contracts as

follows:

- a. The IDHC may elect to divide the Services into more than one Contract, and enter into negotiations with a Proponent with respect to a portion of the Services, and award more than one Contract with respect to the Services;
- b. If negotiations with any Proponent are not successful within such time period as the IDHC may require, the IDHC may at any time after the expiry of such time period discontinue further negotiation with that Proponent by written notice to the Proponent, and the IDHC may at any time thereafter commence negotiations with another Proponent to finalize a Contract in accordance with the foregoing process with another Proponent. The foregoing process may be undertaken and/or repeated until either a Contract or Contracts are awarded by the IDHC or until negotiations have been terminated by the IDHC; and
- c. The IDHC reserves the right to negotiate additional services of a similar functional or technological nature from the successful Proponent without further competitive procurements.