

Children's Aid Society – Nipissing Parry Sound Strategic Planning Consultant



**Main Office
433 McIntyre St. West,
North Bay, Ontario
P1B 2Z3**

**REQUEST FOR QUOTE: DEVELOPMENT AND IMPLEMENTATION OF A
STRATEGIC PLAN FOR THE CHILDREN'S AID SOCIETY OF THE DISTRICT
OF NIPISSING AND PARRY SOUND – RFQ#20120106**

Contact: Natalie Aubin

Children's Aid Society, District of Nipissing and Parry Sound
Supervisor, Quality Assurance and Improvement

Phone: 705-667-0158

Email: natalie.aubin@parnipcas.org

1.0 BACKGROUND INFORMATION

The Children's Aid Society of the District of Nipissing and Parry Sound is a multi-service children's organization with approximately one hundred and seventy-five (175) employees providing services in early intervention, youth justice, and child protection. There are six (6) main sites, four (4) of which are located in North Bay at: 433 McIntyre Street West, 471 Main Street East; 457 Main Street West and 6 Airport Way in North Bay. The other two (2) sites are located in Burks Falls and Parry Sound.

The Children's Aid Society of the District of Nipissing and Parry Sound is a community service agency mandated by the Province of Ontario through the Child and Family Services Act (2000) to ensure the best interests, protection, and well-being of children. We are committed to promoting the well-being and protection of children and youth, and to advocating for their fundamental entitlements. In fulfilling this commitment, the Society will provide services that maintain and enhance the natural environments of home and community; that will ensure the safety of children, youth and the public; that establishes partnerships with other community services; and that demonstrates management practices based on teamwork and professional ethics.

2.0 PURPOSE

The purpose of this request is to solicit consultation services from a qualified professional with expertise in strategic planning and assessment that will support the development of the Children's Aid Society's 5-year strategic plan and revision of its vision, mission, and value statements.

3.0 APPROACH

The strategic planning process should be collaborative in its approach. Direction and support for the project will be provided by the Supervisor, Quality Assurance and Improvement. The consultant is expected to inform the design of the strategic planning process and instruments; analyze the data that is collected, and produce a report based on the findings. It is expected that the process undertaken by the consultant contribute to increasing internal planning capacity within the organization.

In support of the development of an organizational strategic plan, preliminary steps have been taken to engage in discussions with staff and management as well as with the Board of Directors. The strategic plan is the framework by which our agency seeks to define goals, establish priorities, monitor our progress, and measure relative impact. The strategic plan should be aligned with government legislation and provincial policy and direction. Having a thoughtfully developed, evidence-informed strategic plan is critical to our success as an agency.

4.0 EXPECTED TIMELINES

The responsibilities defined below are to be completed no later than April 30, 2012.

5.0 DELIVERABLES

Review and analysis of our existing strategic plan and qualitative data gathered through previous discussion groups held with frontline staff, management, and the Board of Directors. Will include integration of the information of these previous sessions into the actual planning exercise;

- a. Conduct external and internal consultations informing:
 - i. the definition of the CAS vision, mission, and value statements; and
 - ii. the development of the organization's strategic plan;

*(***Internal and external stakeholders include the following: Board of Directors, frontline staff, management, recipients of service, volunteers, and community partners)*

- b. Provide a report to summarize the discussions and conduct an analysis of the feedback collected. This analysis will serve as a driver that will influence the strategic plan's focus and direction;
- c. Draft the 2012-2017 strategic plan; including the revised vision, mission, and value statements.

6.0 QUALIFICATION OF THE CONSULTING TEAM

Proposals will be evaluated from firms or individuals that can demonstrate that they have the necessary staffing, facilities, experience, ability, and financial resources to perform the work in a satisfactory manner. Proven track record must be demonstrated.

The Children's Aid Society of the District of Nipissing and Parry Sound reserves the right to inspect the bidder's facility and to perform such investigations as may be deemed necessary to insure that competent personnel and management and suitable equipment/material will be used in the performance of this contract.

7.0 EVALUATION

It is requested that the consultant submit a formal written proposal in the form of a work plan, outlining activities, timelines, and costs involved in the preparation of the strategic plan. It will also involve the submission of a current resume highlighting relevant experience in strategic planning, including the identification of three referees.

Candidate submissions will be considered for the following:

- a. Consultant's experience/expertise in strategic planning;
- b. Understanding of the scope of the project and strategic planning process;
- c. Cost of the work to be completed;
- d. Ability to meet the expected timelines;
- e. Availability of the consultant for required on-site meetings.

7.1 Evaluation Team

Proposals will be evaluated by an evaluation team with representation from all key functional areas including the Executive Director, Director of Services, and Supervisor of Quality Assurance and Improvement.

BY RESPONDING TO THIS RFQ, PROPONENTS AGREE TO ACCEPT THE RECOMMENDATION OF THE EVALUATION TEAM AS TO THE SUCCESSFUL PROPONENT AND ACKNOWLEDGE AND AGREE THAT THE CHILDREN'S AID SOCIETY OF THE DISTRICT OF NIPISSING AND PARRY SOUND EVALUATION TEAM MAKES THE FINAL DECISION.

7.2 Selection Process

- a. receive written responses from Proponents;
- b. evaluate Proposals;
- c. interviews, if necessary;
- d. recommendation; and
- e. Agreement, Purchase Order or Contract Record.

7.3 Interviews

After the Evaluation Team shortlists the proposals submitted, those Proponents who are selected to be interviewed will be notified by fax or email of the date and time for their presentation. The interviews will take place at 457 Main Street West, North Bay, ON. – Room A.

8.0 REQUEST FOR QUOTE

8.1 Closing Date and Time

Proponents are required to submit one (1) Original and four (4) copies of the Request for Quote form in a sealed envelope clearly identified as **Request for Quote, Development and Implementation of a Strategic Plan for the Children's Aid Society of the District of Nipissing and Parry Sound. Submissions will be received at 433 McIntyre Street West, North Bay, Ontario P1B 2Z3, until 2:00 p.m. local time Wednesday, January 18, 2012.**

8.2 Late Submissions

Proposals received by the agency later than the specified closing time will be returned, unopened, to the proponent.

8.3 Period of Acceptance

The Proposal submission is to remain firm for acceptance for a period of one hundred and twenty (120) days from the date of closing.

8.4 Questions/Inquiries

- a. Additional information or clarification of any of the instructions or information contained herein regarding this Request for Quote are to be directed to Natalie Aubin, Supervisor, Quality Assurance and Improvement, either by facsimile at 705 472-2185 or e-mail natalie.aubin@parnipcas.org. Inquiries **must not** be directed to other Society employees or Elected Officials. **Directing inquiries to other than Supervisor, Quality Assurance and Improvement may result in your submission being rejected.**
- b. All clarification requests are to be sent in writing to the individual mentioned above. No clarification requests will be accepted by telephone. **Responses to clarification requests will be provided to all proponents in writing.**
- c. All changes to or clarifications of the terms, conditions or specifications required before proposal closing will be issued by the Supervisor, Quality Assurance and Improvement in the form of a written Addendum. If Addenda are issued, their receipt must be acknowledged by the Proponents. **All addenda will be posted to The Children's Aid Society of the District of Nipissing and Parry Sound's website www.parnipcas.org. The Children's Aid Society of the District of Nipissing and Parry Sound** (herein after known as the Society) will assume no responsibility for oral instruction or suggestions. **FAILURE TO ACKNOWLEDGE RECEIPT OF ALL ADDENDA MAY RESULT IN YOUR BID BEING REJECTED.**
- d. Each proponent must review all proposal documents and promptly report and request clarification of any discrepancy, deficiency, ambiguity, error, inconsistency, or omission contained therein. Any such request must be submitted to the Agency in writing, prior to **Friday, January 13, 2012.**
- e. Where a request results in a change or a clarification to the proposal, the Society will prepare and issue an Addendum to this proposal as stated in 8.4 c).

8.5 Rights Reserved by the Society

- a. Submission of a quote indicates acceptance by the firm of the conditions contained in the Request for Quote, unless clearly and specifically noted in the proposal and in any contract between the Society and the firm selected.
- b. The Society is not liable for any costs incurred by the proponent in the preparation of their response to the RFQ or selection interviews, if required. Furthermore, the Society shall not be responsible for any liabilities, costs, expenses, loss or damage incurred, sustained or suffered by any proponent, prior or subsequent to, or by reason of the acceptance, or non-acceptance by the Society of any proposal, or by reason of any delay

in the award of the Proposal.

- c. The lowest bid proposal will not necessarily be accepted. The Society reserves the right to accept/reject any or all proposals and/or reissue the RFQ in its original or revised form.
- d. The Society reserves the right to request specific requirements not adequately covered in their initial submission and clarify information contained in the RFQ.
- e. The Society reserves the right to modify any and all requirements stated in the Request for Quote at any time prior to the possible awarding of a contract.
- f. The Society reserves the right to cancel this RFQ at any time, without penalty or cost to the Society. This RFQ should not be considered a commitment by the Society to enter into any contract.
- g. In the event of any disagreement between the Society and respondent regarding the interpretation of the provisions of the RFQ, the Supervisor, Quality Assurance and Improvement for the Children's Aid Society of the District of Nipissing and Parry Sound or an individual acting in that capacity, shall make the final determination as to interpretation.

8.6 Treatment of Information

- a. The information submitted in response to this Request become the property of the Society and as such, will be treated in accordance with the relevant provisions of the Municipal Freedom of Information and Protection of Privacy Act. The information collected will be used solely for the purposes stated in this Request.
- b. The proponent does, by the submission of a Quote, accept that the information contained in it will be treated in accordance with the process set out in this section of the RFQ.

8.7 Infringements and Indemnifications

Proponents shall protect, defend and save the Children's Aid Society of the District of Nipissing and Parry Sound harmless from suits or actions of every nature and description brought against it, for or on account of any injuries or damages received or sustained by a part or parties, by or from any of the acts of the proponent, and/or the agents, employees, successors or assigns the proponent.

8.8 RFQ Schedule

The following is a tentative schedule to assist proponents:

Evaluation of Proposal	January 20, 2012
Interviews (if required)	January 24, 2012
Award of Proposal	January 27, 2012

9.0 REQUIREMENTS AT TIME OF EXECUTION

Subject to an award of the Quote, the successful bidder is required to submit the following documentation in a form satisfactory to the Society for execution within ten (10) working days after being notified to do so in writing:

9.1 Liability Insurance Documents

Insurance and Indemnification:

The successful bidder shall at its own expense obtain and maintain until the termination of the contract, and provide the Society with evidence of:

- a. comprehensive general liability insurance on an occurrence basis for an amount not less than two million (\$2,000,000) dollars and shall include the Society as an additional insured with respect to the successful bidders operations, acts and omissions relating to its obligations under this Agreement, such policy to include non-owned automobile liability, personal injury, broad form property damage, contractual liability, owners' and contractors' protective, products and completed operations, contingent employers liability, cross liability and severability of interest clauses.
- b. Professional Liability Insurance and Errors and Omissions Insurance. If the Services include brokerage, architectural, design, engineering or consulting Services, then Errors and Omissions (E&O) insurance providing limits of not less than \$1,000,000 per occurrence shall be required.
- c. Automobile liability insurance for an amount not less than two million (\$2,000,000) dollars on forms meeting statutory requirements covering all vehicles used in any manner in connection with the performance of the terms of this Agreement.
- d. The policies shown above will not be cancelled or permitted to lapse unless the insurer notifies the Society in writing at least thirty (30) days prior to the effective date of cancellation or expiry. The Society reserves the right to request such higher limits of insurance or other types of policies appropriate to the work as the Society may reasonable require.

- e. The successful bidder shall not commence work until such time as the required evidence of insurance has been filed with and approved by the Manager of Finance and Administration or Designated individual. The successful bidder shall further provide that evidence of the continuance of said insurance is filed at each policy renewal date of the duration of the contract.
- f. The successful proponent shall indemnify and hold the Children's Aid Society of the District of Nipissing and Parry Sound, harmless from and against any liability, loss, claims, demands, costs and expenses, including reasonable legal fees occasioned wholly or in part by any acts or omissions either in negligence or nuisance whether willful or otherwise by the Proponent, its agents, officers, employees or other persons for whom the Proponent is legally responsible.

9.2 Workplace Safety & Insurance Board

- a. The successful proponent shall furnish a WSIB Clearance Certificate indicating their WSIB firm number, account number and that their account is in good standing. This form must be furnished prior to commencement of work. The successful bidder further agrees to maintain their WSIB account in good standing throughout the contract period.
- b. The Society will require the successful proponent to produce a Clearance Certificate from WSIB from time to time during the contract on request and/or prior to final payment.
- c. If the successful proponent is a self – employed individual, partner or executive officer who does not pay WSIB premium and is recognized by WSIB as an 'independent operator' a letter from WSIB acknowledging independent contractor status and confirming that WSIB cover is not required must be provided to the Society prior to commencement of work.
- d. Copies of your last three years injury statistics and notification if your firm has been involved in a Critical Injury reportable to the Ministry of Labour (MoL) and copies of any MoL written order if it relates to the work you will be performing for the CASNPS.

9.3 Health and Safety Documentation

- a. Licenses' or competency documents / Safety training records of the employees you will use on CASNPS projects - We require that you or your workers have participated in legislated and required safety training such as Workplace Hazard Material Information System (WHMIS), fall arrest training, machine/tool operation, etc, and meet the requirements of and participate in the CASNPS Contractor / Subcontractor Policy and procedure, Contractor training Orientation, and pre-qualification process.

If the successful bidder for any reason, defaults or fails in any matter or thing referred to under "Requirements at Time of Execution", the Society reserves the right to accept any other bid, advertise for new quotes or carry out the work in any way as the Children Aid Society of the District of Nipissing and Parry Sound may, at its sole discretion, deemed best.

10.0 TERMS AND CONDITIONS

10.1 Assignment

Following award of the contract, the successful bidder shall not, without written consent of the Executive Director make any assignment or any subcontract for the execution of any service or product hereby proposed.

10.2 Exclusion of Bidders In Litigation

- a. The Society may, in its absolute discretion, reject a Quote or Proposal submitted by the bidder if the Bidder, or any officer or director of the bidder is or has been engaged, either directly or indirectly through another corporation, in a legal action against the Society, its elected or appointed officers and employees in relation to:
 - i. Any other contract or services; or
 - ii. Any matter arising from the Society's exercise of its powers, duties, or functions.
- b. In determining whether or not to reject a quotation, or proposal under this clause, the Society will consider whether the litigation is likely to affect the bidder's ability to work with the Society, its consultants and representatives, and whether the Society's experience with the bidder indicates that the Society is likely to incur increased staff and legal costs in the administration of the contract if it is awarded to the bidder.

10.3 Exclusion of Bidders Due To Poor Performance

- a. The General Manager shall document evidence and advise The Supervisor, Quality Assurance and Improvement in writing where the performance of a consultant has been unsatisfactory in terms of failure to meet contract specifications, terms and conditions or for Health and Safety violations.
- b. The Executive Director or Delegate, may in consultation with the Society's Solicitor, prohibit an unsatisfactory supplier/consultant from bidding on future Contracts for a period of up to three years.

10.4 Timing

The Consultant shall perform the Services expeditiously to meet the requirements of the Client and shall complete any portion or portions of the Services in such order as the Client may require and the Client shall have the right to take possession of an use any completed or partially completed portions of the Work notwithstanding any provisions expressed or implied to the contrary.

The Client shall give due consideration to all designs, drawings, plans, specifications, reports, tenders, proposals and other information submitted by the Consultant, and shall

make any decisions which are required in connection therewith within a reasonable time so as not to delay the work of the Consultant.

I/We, hereby estimate to commence the job in _____ calendar days after notification of award of the contract.

JOB COMMENCEMENT is of the essence and may be considered as part of the award.

10.5 For Further Information:

If further information is required, please contact:

Natalie Aubin, Supervisor, Quality Assurance and Improvement

Children's Aid Society of the District of Nipissing and Parry Sound

433 McIntyre Street West

North Bay, Ontario

P1B 2Z3

Tel: (705) 472-0910 Fax: (705) 472- 2185

11.0 FORM OF QUOTE

AT LEAST ONE ORIGINAL COPY OF THIS FORM OF PROPOSAL MUST BE INCLUDED IN YOUR SUBMISSION

- a. I/WE, the undersigned authorized signing officer of the Bidder, HEREBY DECLARE that no person, firm or Corporation other than the one represented by the signature (or signatures) of proper officers as provided below, has any interest in this proposal.
- b. I/WE further declare that all statements, schedules and other information provided in this quote are true, Complete, and accurate in all respects to the best knowledge and belief of the Bidder.
- c. I/WE further declare that this quote is made without connection, knowledge, comparison of figures or Arrangement with any other company, firm or persons making a proposal and is in all respects fair and without collusion for fraud.
- d. I/WE further declare that the undersigned is empowered by the Bidder to negotiate all matters with the Corporation representatives, relative to this proposal.
- e. I/WE further declare that the agent listed below is hereby authorized by the Bidder to submit this quote and is authorized to negotiate on behalf of the Bidder.
- f. Additional Payee: Please state the Payment Remittance Address (if different than the address Indicated in the Form of Proposal): _____
- g. I/We have received and allowed for Addenda numbered as follows: _____

Failure to acknowledge addendums may result in your proposal being rejected.

QUOTE SUBMITTED:

By:
Address:
City/province:
Postal code/zip code:
Signature:
Title:
Name:
Telephone:
Fax number:
HST registration #:
Email address:
Date of quote submission

NOTE: Please return **this form** on or before **2:00 p.m. Local time, Wednesday, January 18, 2012.**

If your firm is interested in this project, please forward **FOUR (4) COPIES** of your submission to:

By Email: Natalie.Aubin@parnipcas.org

Or Mail to:

The Children's Aid Society of the District of Nipissing and Parry Sound
Attn: Natalie Aubin, Supervisor, Quality Assurance and Improvement
433 McIntyre Street West
North Bay, ON P1B 2Z3

not later than:

2:00 p.m., local time
Wednesday, January 18, 2012

THE LOWEST OR ANY PROPOSAL NOT NECESSARILY ACCEPTED

LATE PROPOSALS WILL NOT BE ACCEPTED

TELEPHONE PROPOSALS WILL NOT BE ACCEPTED

THE SOCIETY'S WEBSITE ADDRESS FOR RFQ documentation IS:

www.parnipcas.org

Yours truly,

Natalie Aubin
Supervisor, Quality Assurance and Improvement

copy: Gisele Hebert – Executive Director

End of RFQ