



Haldimand-Norfolk
REACH

supporting children, families, communities

Haldimand-Norfolk R.E.A.C.H.
Request for Proposal
For Efficiency Assessment

Issue Date: Wednesday, November 8, 2023
Submission Deadline: Monday, December 4, 2023 by 5:00 p.m.
To be submitted to: David Kindy, Finance Manager
rfp@hnreach.on.ca

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1.0 Proposal Invitation Summary

H-N R.E.A.C.H. has initiated a Request for Proposal (RFP) process to identify qualified consultants to complete a comprehensive efficiency assessment to assess our use of technology and provide recommendations relating to optimizing the use to achieve efficiencies, enhance connectivity and maximize our human resources. Additionally, the consultants shall provide a stepwise implementation plan for any recommendations agreed to by the agency.

Areas to be reviewed include but are not limited to the following:

- human resource processes (scheduling, time and attendance tracking, recruitment, training and retention),
- accountability management (finance, funder reporting, Continuous Quality Improvement, risk management),
- internal and external communications/connections (email, text etc.),
- record keeping, technology-based service delivery,
- current human, and other resources used to support technology systems.

2.0 Organizational Profile

H-N R.E.A.C.H. is a multi-service agency, providing children's mental health services, developmental services, autism and behaviour services, youth and justice services, adult counselling, a residential program for transitional-aged youth and several early learning and care services including licensed childcare, EarlyON Child and Family Centre(s) and the Community Action Program for Children. H-N R.E.A.C.H. serves as the Lead Agency for; the Hamilton/Niagara Regional Student Nutrition Program; Child and Youth Mental Health services under the Moving on Mental Health initiative; and Coordinated Service Planning under the Ontario Special Needs Strategy. Through our Contact Division, the agency serves as the single point of access for children's mental health and developmental services as well as coordinating the local Service Resolution Mechanism and Complex Special Needs process.

H-N R.E.A.C.H. is recognized as a local leader in community education, advocacy, inter-sector collaboration and Community Service Planning. The Agency's administrative office is located at 101A Nanticoke Creek Parkway, Townsend. Other agency locations include 12 EarlyON Child and Family Centres, a youth residence program located in Simcoe; satellite service locations at 228 John Street, Simcoe and 110 Ramsey Drive, Dunnville, as well as a number of partner and leased locations throughout the 2 counties. The website is www.hnreach.on.ca.

The Agency has an annual operating budget of \$15 million and employs approximately 180 full and part time staff.

For your reference, please see [Appendix A](#) for H-N R.E.A.C.H.'s Organizational Chart 2023/24 and [Appendix B](#) for the agency's Vision, Mission, ENDS, Values and Strategic Plan.

3.0 Qualifications and Experience Required

The proposal must describe the consultant's qualifications such as work activities, expertise, knowledge and experience. Experience should include examples of similar related non-profit work.

Some key qualifications that will be considered:

- Management consulting education and experience

- Experience conducting organizational efficiency analysis focused on technological systems
- Experience analyzing internal processes for multi-sector organizations
- Ability to analyze technological systems and make recommendations to optimize use of technology
- Familiarity with the following systems:
 - Sage HRMS 2017
 - Sage 300 (2019)
 - Sage Employee Self Service 2017
 - Insperity TimeStar version 8
 - Softrak Adagio 9 (all modules are utilized including FX)
 - Surge Learning Inc
 - Microsoft 365

4.0 Contract Structure

The contract will cover the period January 2, 2024 to March 31, 2024¹.

The successful bidder will be required to enter into an agreement with H-N R.E.A.C.H. for the provision of the Deliverables.

5.0 Requested Information

- An overview of the organization/individual highlighting relevant areas of experience and similar project completed for social service organizations.
- A project plan that demonstrates a clear understanding of the work to be performed, estimated hours, and other information relevant to the project.
- Sample project timeline with major tasks and milestones.
- Detailed project budget.
- Budget and timeline aligned with key deliverables.
- Identification of those on the team who will be involved with the project which should include their role and experience.
- References from (3) clients (including a minimum of one (1) past client).

Workplan

The proposal should include a detailed description of the activities to be conducted by the consultant to complete the work, which will comprise of the following:

- Specific activities to be conducted at each stage
- Sample timeline for the activity at each stage
- List of milestones and deliverables tied to the activities
- Proposed payment schedule tied to project milestones and deliverables

¹ Contract end date is subject to negotiation.

References

Information regarding each reference should include the individual's name, address, phone number, email address and a brief description of the work completed.

6.0 Application Procedure

If any additional clarification is needed, please contact David Kindy by email at rfp@hnreach.on.ca.

Interested bidders shall submit an electronic version of all required documentation in PDF format. Should you require an alternative format/mode of submission, please contact the individual named above.

Interested bidders are invited to submit a budget plan that represents resource allocations needed to achieve the identified goals.

6.1 Instructions for Submission

1. Closing Submission Date

Proposals are due: Monday, December 4, 2023 at 5:00 p.m.

2. Inquiries

Inquiries concerning this RFP should be directed to David Kindy at rfp@hnreach.on.ca. The deadline for questions/clarifications is Monday, November 20, 2023 at 5:00 p.m.

3. Conditions of Proposal

All costs incurred in the preparation of a response to this RFP are the responsibility of the bidder and will not be reimbursed by H-N R.E.A.C.H.

4. Narrative Description

Narrative description of the project proposal should not exceed 8 pages. Submissions will NOT be returned.

All proposals received by the deadline will undergo a preliminary screening. Late or incomplete applications will not be accepted for review and rating. Any proposal may be disqualified if it deviates from the submission instructions in the RFP.

5. Reservation of Rights

H-N R.E.A.C.H. reserves the right to request or negotiate changes in a proposal, to accept all or part of a proposal, or to reject any or all proposals. H-N R.E.A.C.H. may, at its sole and absolute discretion, select no provider for this project if, in its determination, no bidder is sufficiently responsive to the need. H-N R.E.A.C.H. reserves the right to withdraw this Request for Proposal (RFP), and/or any item within the RFP at any time without notice. H-N R.E.A.C.H. reserves the right to disqualify any proposal which does not adhere to the RFP guidelines. This RFP is being offered at the discretion of H-N R.E.A.C.H. It does not commit H-N R.E.A.C.H. to award any grant.

6. Confidentiality

If the bidder deems any material submitted to be proprietary or confidential, the bidder must indicate this in the relevant sections of the response.

7. Ineligibility

Under the following conditions, an individual or entity is ineligible to be a H-N R.E.A.C.H. vendor, and therefore may not submit a proposal.

- H-N R.E.A.C.H. employees and Board members and their family members.

8. Notification of Selection and Timeline

H-N R.E.A.C.H. will select the RFP Selection Committee. The evaluation process will include individual committee member's evaluation and rating of each proposal, followed by committee discussion and ranking of proposals. After preliminary rating and ranking of proposals, interviews will be scheduled with finalists. References will be contacted for all finalists.

The final recommendation of the RFP Selection Committee is not subject to appeal. All bidders will receive written notification of H-N R.E.A.C.H.'s decision regarding their proposal.

Additional information may be required from the selected bidder prior to the awarding of the project. Any information withheld or omitted, or failure to disclose any history of deficiencies shall disqualify the bidder from award of the project and/or contract. H-N R.E.A.C.H. reserves the right not to select a bidder for project implementation if, in its determination, no qualified bidder has applied or is sufficiently responsive to the project need.

Where no satisfactory proposal is received, H-N R.E.A.C.H. reserves the right to cancel this RFP process, request re-bids, or negotiate a contract for the whole or any part of the provision of the required service as outlined in this RFP.

In the event that no proposal is selected, H-N R.E.A.C.H. may elect to issue a new RFP to attempt to expand the pool of potential respondents.

6.2 Electronic Bid Submission

All proposals must be submitted electronically to the attention of David Kindy, rfp@hnreach.on.ca.

Packages received after the closing time (5:00 p.m.) will not be accepted. H-N R.E.A.C.H. reserves the right to amend this Request for Proposal (RFP) document through written addendum, up to three (3) business days prior to closing time.

The bidder shall not modify or withdraw its proposal without H-N R.E.A.C.H. consent for a period of thirty (30) days after the closing date. The RFP tentative timeline is as follows:

Request For Proposal opens to tender:	Wednesday, November 8, 2023
Deadline for questions, clarifications:	Monday, November 20, 2023 at 5:00 p.m.
Bidder submission deadline:	Monday, December 4, 2023 at 5:00 p.m.
Interviews for selected bidders:	Tuesday, December 12, 2023
Bidder selected and notified:	Tuesday, December 20, 2023
Contract start date:	Tuesday, January 2, 2024
Contract completion (preferred):	Sunday, March 31, 2024 ²

² Contract end date is subject to negotiation.

The RFP timetable is tentative only and may be changed by H-N R.E.A.C.H. at any time. Proposals will be assessed on the following:

1. Demonstrated experience with an understanding of the desired outcomes;
2. Proposed bidder's experience, understanding and expertise in relevant work;
3. Quality of the proposal, including the methodology and approach to be used;
4. Expected ability to deliver efficiency assessment on time and within budget.

The award shall be made to the bidder whose qualifications and experiences are deemed to be the best fit for the requirements of the contract work.

Submitted application packages do not in any way constitute a binding agreement between H-N R.E.A.C.H. and any bidder. H-N R.E.A.C.H. shall not be obligated in any manner to any bidder, unless and until a written contract has been duly executed between H-N R.E.A.C.H. and the successful bidder. H-N R.E.A.C.H. reserves the right to reject any and all application packages.

H-N R.E.A.C.H. will evaluate submitted application packages on the basis of overall fit with the contract requirements. They will be scored using the criteria below.

6.3 Evaluation Criteria:

Mandatory:

Proposal received on time in electronic (PDF) format	Pass/Fail
Disclosure statement: any actual or potential conflict of interest	Pass/Fail

Experience and Skills

Overview of the organization , highlighting relevant areas of experience and similar projects completed for social service organizations	35%
• Combined score of written submission and interview	
Project Workplan shows an understanding of the project	35%
• Combined score of written submission and interview	
References from (3) clients (including a minimum of one (1) past client)	20%
Financial Considerations	10%
• Hourly, project rate, affordability	
• Estimated Expenses	
Total Score:	100%

6.4 Method of Resolving a Tie Score

- Highest score in the Overview of the Organization will be used to determine the successful bidder
- If this is tied, the highest score in the Project Workplan will be used to determine the successful bidder
- And if this is tied, the highest score in the Financial Considerations score will be used to determine the successful bidder

7.0 Additional Terms and Conditions

7.1 Ownership and Confidentiality

All data, documentation, information, notes, completed questionnaires, reports, analyses, intellectual property or other material produced for or in conjunction with, created as a result of, or otherwise associated with H-N R.E.A.C.H. and the services to be provided under this RFP and the contract made hereafter, shall remain the property of H-N R.E.A.C.H.

Any and all information relating to H-N R.E.A.C.H., which is made known to the bidder in the course of providing service to H-N R.E.A.C.H., shall remain confidential to all parties. The RFP process in its entirety shall also remain confidential to all parties. The bidder shall abide by all applicable Provincial and Federal laws and regulations concerning the handling and disclosure of private and confidential information.

By acceptance of this document, the recipient agrees to be bound by the aforementioned statements.

7.2 Conflict of Interest

The bidder will ensure that their direct or indirect personal interests do not, whether potentially or actually, conflict with H-N R.E.A.C.H.'s interests. The bidder agrees to promptly report any potential or actual conflicts of interest to H-N R.E.A.C.H. A conflict of interest includes, but is not expressly limited to the following:

- (a) Private or pecuniary interest in an organization with which H-N R.E.A.C.H. does business.
- (b) A private or pecuniary interest, direct or indirect, in any concern or activity of H-N R.E.A.C.H. of which the bidder is aware of or ought reasonably to be aware.
- (c) Pecuniary interests include the pecuniary interest of the bidder's parent, spouse, partner, child or relative, a private corporation of which the bidder is a shareholder, director or senior officer, and a partner or other employer.

7.3 Indemnification

The bidder shall hold H-N R.E.A.C.H. as well as the Board of Directors and employees of H-N R.E.A.C.H. harmless and shall indemnify any and all awards and costs related to any claim or action brought against any of them for property damage, bodily injury, death or other causes, as a result of responding to this RFP or a service provided to H-N R.E.A.C.H. by the bidder.

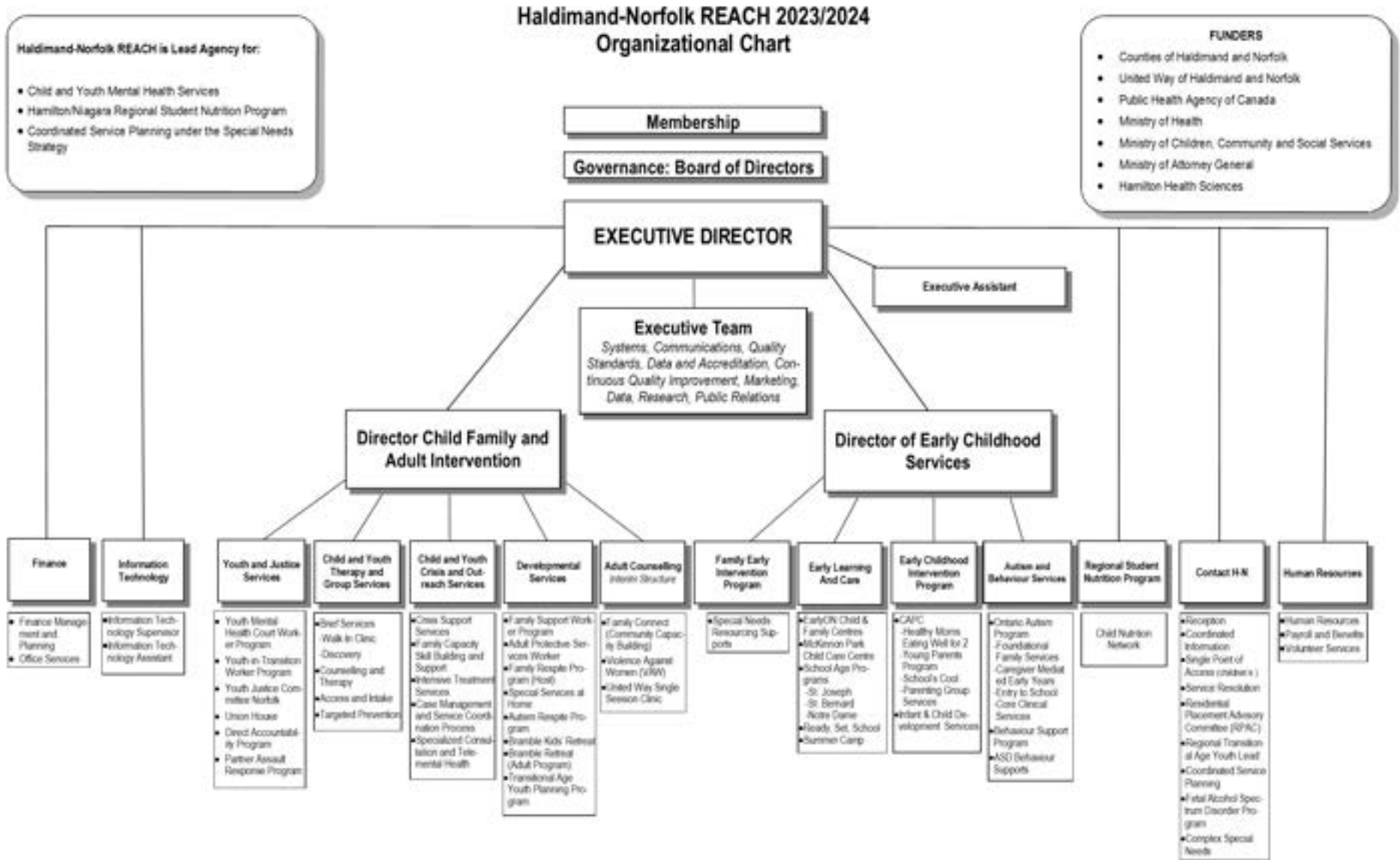
7.5 Assignment

The bidder shall not assign or transfer all or any part of its rights or obligations under this agreement without the prior written consent of H-N R.E.A.C.H.

7.6 Governing Law

This Agreement shall be governed and construed in accordance with the laws of the Province of Ontario.

8.0 Appendix A: H-N REACH Organizational Chart 2023/2024



9.0 Appendix B: Vision, Mission, ENDS, Values and Strategic Plan

Haldimand-Norfolk R.E.A.C.H. Strategic Plan

Vision

There will be increased well-being among individuals and families in the communities of Haldimand and Norfolk, fostered by Haldimand-Norfolk Resource, Education And Counselling Help (H-N REACH) as a community leader and partner

Mission

Haldimand-Norfolk REACH promotes and supports social inclusion and community well-being by providing co-ordinated access, planning, programs and services for children, families and communities.

ENDS POLICIES

1.0 PREVENTION AND EARLY INTERVENTION

Haldimand-Norfolk REACH will promote programs and services that emphasize prevention and early intervention of the social, emotional and developmental concerns relating to individuals and families.

- 1.1 Community members will be able to identify potential risk factors and indicators of social, emotional and developmental concerns of individuals and families, and take appropriate action.
- 1.2 Haldimand-Norfolk REACH will be aware of changing social, emotional and developmental needs of individuals and families.

2.0 INFORMATION AND EDUCATION

The community will be able to identify programs and services available to individuals and families within the Haldimand and Norfolk service areas.

- 2.1 The community will be able to identify risk factors and indicators that may lead to access to programs and services available to individuals and families.
- 2.2 Haldimand-Norfolk REACH will maintain an awareness of the changing social, emotional and developmental needs of families and individuals in order to support access to services and provide assistance when needed.
- 2.3 Haldimand-Norfolk REACH will collect and provide information and educate the general community on programs and services available to them.

3.0 ACCESSIBILITY

Through Haldimand-Norfolk REACH, the community will be provided with co-ordinated access, planning, programs and services.

- 3.1 The community will be aware of access, planning, programs and services.
 - 3.1.1 There will be an emphasis on target populations at risk for social, emotional and developmental challenges.
- 3.2 Access to programs and services will be responsive to individuals and families.

4.0 APPROPRIATENESS

Individuals and families will receive coordinated services that are based on quality standards and subject to regular evaluation. Individuals and families not eligible for programs and services available through Haldimand-Norfolk REACH will be provided with assistance in accessing alternative programs and services.

- 4.1 Within the limits of resources made available to the agency, individuals and families will receive programs and services appropriate to their needs.
 - 4.1.1 Individuals and families in greatest need will receive priority.
 - 4.1.2 Individuals and families will receive assistance from Haldimand-Norfolk REACH in a timely manner.
 - 4.1.3 The capacity of all community services will be considered in seeking to provide assistance to individuals and families.

5.0 PROMPTNESS Community members will receive prompt responses to inquiries.

Guiding Principles

We welcome all voices.

Our actions will be guided by our Value Statements About Services and Employees.

We are mindful that our services belong to the communities of Haldimand and Norfolk.

We care about one another and lead by example.

Haldimand-Norfolk R.E.A.C.H. Strategic Plan

Value Statements About Services

We respect children, families and communities.

We provide services that support human rights (such as health, safety and freedom from abuse) of children, families and communities.

We support children, youth, adults and families in exercising their rights as citizens.

Our services are flexible and based on individual needs and goals.

We will ensure that children, families and communities are partners in service planning.

Our programs work together to provide coordinated and responsive services.

We will enhance services by working in partnership with other community service providers.

Our services are based on best practices, professional ethics and standards, and ongoing quality improvement.

Value Statements and Guiding Principles About Staff

Respect

We acknowledge, value and utilize the gifts and diversity of the REACH team.

We value honesty and integrity in each other.

We each have a responsibility to promote a respectful work environment.

Excellence

We combine our areas of expertise to support each other in the delivery of comprehensive and coordinated services.

We promote a safe environment and believe in continuous improvement through learning from all experiences.

We value personal/professional development and believe that this is a wise investment.

Appreciation

We value a workplace that fosters fun, safety and enthusiasm.

We believe in encouraging, recognizing and acknowledging contributions.

We acknowledge commitment and dedication.

Communication

We promote open and ongoing communication to foster a strong REACH team.

We believe in fair and consistent application of policies.

We believe in working collaboratively toward solutions.

Home ~ Work ~ Life Balance

We believe in the importance of family.

We believe in ongoing assessment to ensure meaningful use of time and resources.

We encourage wellness and self-care for all.

Haldimand-Norfolk R.E.A.C.H. Strategic Plan



Assess, evolve and optimize our use of technology to achieve efficiencies, enhance connectivity, maximize our human resources, and engage service participants in new ways.

- Conduct an efficiency assessment at H-N REACH.
- Development of a Staff Technology Training Plan.
- Develop a Data Analytics strategy and system.
- Updated 3-5 year Information Technology plan to coincide with new Strategic Plan.



Maintain a safe, healthy and positive work environment, while enhancing methods to attract and retain talented professionals to the H-N REACH team.

- Embed employee engagement practices into the agency culture and policies.
- Comprehensive recruitment strategy developed and implemented.
- Create new opportunities for knowledge mobilization across the organization.
- Track, monitor and support a healthy organizational culture.



Increase our site locations across Haldimand-Norfolk, reinforce our distinct brand, and ensure availability of services for equity-seeking populations.

- Update our practices, processes, and documentation for securing new programs and services.
- Develop and implement strategy to leverage Social Media as a communication and engagement tool to reach expanded audiences such as: community youth, young families, and prospective employees.
- Develop new site locations to expand our services in more communities whether through real estate purchase, leasing, or shared spaces with other service partners.

Haldimand-Norfolk R.E.A.C.H. Strategic Plan



Strengthen and develop our leadership and service delivery capabilities to become more efficient, effective, accountable, and adaptive.

- Collaborate with funders and community partners to address increasing complexity and volume of service participant needs and related resource requirements.
- Develop a data management strategy to support decision-making in service delivery and key operational processes.
- Training for employees on the importance of data collection and how it is used to tell the story of how our services make a difference.
- Consistent meaningful feedback loops to community partners, funders, staff and service participants regarding evaluation outcomes.



H-N REACH will strengthen and develop our governance capabilities to become more efficient, effective, accountable, and adaptive.

- Provide annual governance training related to Board operations, culture, financial oversight and Roberts Rules of Order.
- The Board will more clearly identify time and responsibility expectations for new Board members.
- The Board will explore options for the use of more external expertise to inform the Board in key governance areas.



Grow our service delivery capacity through new or expanded service contracts and independent revenue-generating initiatives.

- Assess the costing, risk/benefits of contracting out back-office functions.
- Expand our site locations through purchasing brick and mortar locations in Haldimand and Norfolk.
- Update and finalize the Executive Team New or Enhanced Project Proposal form.