



Requests for Proposals

**Facilitator to Lead Homes First's
Strategic Planning Session**

Question Deadline Friday November 20th 5:00pm

Proposal Deadline Friday December 4th 5:00pm

Friday October 30th 2020

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PART 1 BACKGROUND

Homes First Society (HFS) is a charitable agency that was formed as a new response to an old problem in 1983. From inception, HFS's goal has been to come up with creative and innovative solutions in facing the many challenges of housing the homeless. People need homes before they can begin to work on other life issues. HFS is a multi-service agency, operating both shelters and respite sites for the homeless. Along with the provision of emergency services to meet basic needs, HFS also provides housing and supports to maintain housing for the most vulnerable population in Toronto.

Homes First Society residents have been street involved for several years and most are isolated and disconnected from day-to-day life. Over 60% of our residents suffer from mental illness and they lack the social connections, networks, and skills to operate successfully in our complex society. Institutions, even those that are there to help, are intimidating. There is sometimes fear of unknown situations and a lack of confidence in their abilities to succeed.

Homes First Society has grown considerably over the last five years and now owns and/or manages seven emergency shelters, two hotel shelter programs and 14 housing sites, providing a home and support to more than 1,400 seniors, families, and single adults every single night. We were the first to provide single adult supportive housing in Toronto and we remain one of the largest providers of non-profit housing for the homeless in the City. We have been relied on by the City of Toronto Shelter Support and Housing Administration (SSHA) in most recent years as an organization that can quickly and effectively open up new models of programs like respites and hotel programs, in a variety of communities. In 2018 we opened the largest winter respite program at the Exhibition grounds for over 225 individuals. Homes First also operated respite services on George Street across from Seaton House, serving over 100 chronically homeless individuals every night. In the last six months we have successfully opened and operated two large hotel programs serving over 380 individuals during this period of COVID-19. Most of these individuals come to us through encampments, reduction in existing shelter capacity and overflow of respite services. Incorporated into these programs are onsite Intensive Case Management (ICM) services such as, harm reduction, primary health, and psychiatric supports. Recognizing that the success of a program depends heavily on both community integration and support, we have grown and matured our internal departments to support positive integration of programs and services into new communities. We achieve this through community liaison communities, outreach to residents and businesses, community events, volunteer opportunities and education.

In line with the more recent growth, Homes First has recently made organizational changes to better serve our residents and donors, ensuring we continue to meet the needs of our clients in the most effective and efficient manner possible. As of late February 2020, Homes First Society assumed the responsibility of all fundraising initiatives previously performed by Homes First Foundation. And since the Foundation has been dissolved. This will enable Homes First to streamline the funding process, better communicate our impact, and maximize the benefit to our residents from the funds we raise.

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From a stakeholder or Funder’s perspective, nothing has changed; our mission and vision remains the same.

At Homes First, we have been committed to providing supportive housing and shelters for over 35 years to all populations. However, we must acknowledge that the environment we all work and live in is not experienced the same way by all populations. Members of the Board and Management at Homes First Society are committed to supporting staff and residents in this urgent and important priority of reducing the disparities linked to race. We recognize this extraordinary moment and express solidarity with our Black, Indigenous, and marginalized communities, whose anger and grief must be acknowledged and addressed if we are to achieve our vision of a healthy and thriving community for all. One action Homes First is undertaking is the creation of a scholarship program to address some of the gaps and needs we have identified in order to increase access and to support Black and Indigenous staff. In addition, the Homes First Board and Management Team is committing to the following actions: We will review our current existing strategic plan with a view of continuing to be aware of ways that we can address systemic racism and oppression; and we will invite meaningful input from Black and Indigenous stakeholders.

The Board of Directors and the Management Team of Homes First is committed to address these issues through some of the following actions:

- The Board is to have a more active role in being part of the solution. One of the ways is to study converting the ad-hoc sub-committee on Anti-Racism Anti-Oppression Sub-Committee into a Board standing committee, or some other form of Board involvement to facilitate the planning of other concrete future action steps, with opportunity for staff and tenant involvement and input; and,
- The Board members will engage in training opportunities to assist in learning of their biases, and reflecting on these in order to minimize these biases in themselves and in the workplace. In addition, Management and staff will continue the training that assists staff in learning of their biases and reflecting on these to minimize those biases in the workplace.

Homes First Society has Anti-Racism and Code of Conduct policies that must be followed in the facilitation process. Please review the attached policies.

PART 2 PROPOSAL SUBMISSION INFORMATION

Brief

The Board and strategic plan working group of Homes First Society intend to hire a facilitator with strategic planning subject matter expertise to support our efforts in planning and executing a strategic planning event, tentatively expected to take place in early 2021. Due to COVID-19, we intend to hold this event virtually. HFS is requesting proposals from qualified applicants to provide, on a fixed fee basis, facilitation services as specified in the Scope of Work.

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The pages in this document are referred to as the “Request for Proposals (“RFP”) Package Documents”. The Package Documents can be found on HFS’s web site at www.homesfirst.on.ca in the News & Media section – Latest News and on the Merx website at www.Merx.com. Addenda and other information related to the RFP will be released on the HFS website and all applicants will also be emailed any addendum issued.

The deadline to complete and submit the RFP Package Documents is **Friday December 4th by 5:00pm**. HFS reserves the right to reject any proposal received after the time and date that is stated. HFS will evaluate proposals for an estimated two to four weeks and will respond to all applicants and send a Notice of Award to the successful applicant. All Proposals shall remain open for four to six weeks after the proposal due date. Proposals will be opened at HFS’s convenience on or after the proposal due date. HFS reserves the right to waive any informality or informalities in any proposal, during the proposal process and HFS has the right to reject any or all the proposals, or any part(s) thereof.

Homes First Society is an Equal Opportunity and Affirmative Action employer and is committed to nondiscrimination in its hiring, employment, contracting, or business practices. HFS is committed to complying with the Canadian Human Rights Act of 1977 which protects Canadians from discrimination and the organization does not discriminate on the basis of disability in admission to, access to, or operation of its programs, services, or activities. HFS is also committed to the equal treatment to people who require accessibility accommodations. Applicants must strictly comply with all applicable accessibility standards required by the AODA and its regulations while carrying out their obligations under any Agreement entered with HFS. Failure to comply with the AODA may result in the immediate termination of any Agreement.

All proposed work involved in this contract should be implemented and completed within four weeks before the event and two weeks after.

Questions regarding this RFP must be submitted by email to reidun.rosi@homesfirst.on.ca by **Friday November 20th, 2020**. All questions and answers will be emailed out to all applicants by **Friday November 27th, 2020**.

Any applicant considering submitting a proposal is prohibited from having any communications about this RFP or any resulting contract with any HFS staff member or any HFS Board member.

Proposals may be withdrawn at anytime (but not be re-submitted) by emailing reidun.rosi@homesfirst.on.ca.

Proposals shall be in English only.

Projected Timeline

The following is the projected timeline for the RFP process:

HFS releases the RFP	Friday October 30th 2020
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Deadline for Any Questions	Friday November 20th 2020 5:00pm
HFS will email all applicants an addendum (if necessary), based on questions/answers and feedback received from all applicants of RFP Package Documents	Friday November 27th 2020
RFP Package Documents Deadline	Friday December 4th, 2020 5:00pm
Notice of Award - Estimated date HFS will respond to all applicants and issue a Notice of Award to successful applicant. Agreement will follow.	Monday December 21st 2020
Estimated date HFS will terminate negotiations with applicant if agreement not reached after Notice of Award issued.	Monday January 4th 2021

HFS reserves the right to reject any proposal received after the time and date that is stated. HFS will evaluate proposals for an estimated two to four weeks and will respond to all applicants and send a Notice of Award to the successful applicant. All Proposals shall remain open for six weeks after the proposal due date. Proposals will be opened at HFS’s convenience on or after the proposal due date. HFS reserves the right to waive any informality or informalities in any proposal, during the proposal process and HFS has the right to reject any or all the proposals, or any part(s) thereof.

Definitions

“Addendum” or ‘Addenda” means any document or documents issued by HFS prior to the submission deadline that changes the terms of the RFP or contains additional information related to the RFP.

“Agreement” means any written contract entered into by a successful applicant and HFS in connection with the deliverables involved with this RFP.

“AODA” means the Accessibility for Ontarians with Disabilities Act, 2005, as may be amended from time to time.

“Applicant” means a legal entity (whether an individual, corporation, partnership, or other legal entity) interested in delivering a Proposal to HFS in response to the RFP with a view to entering into an Agreement with HFS with respect to the proposal.

“Conflict of Interest” shall have the meaning given to it in PART 3: Terms and Conditions

“Day” means a business or working day other than a Saturday, Sunday, statutory holiday, or statutory vacation day that is observed by the industry relating to the RFP.

“Deliverables” or “Services” means all services and/or deliverables to be provided by the selected

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applicant, as described in this RFP.

“HFS” means Homes First Society

“HST” means Harmonized Sales Tax

“Notice of Award” means the communication sent by HFS to the successful applicant of this RFP.

“Proposal” means the final submission package to be delivered by applicants to HFS in response to the RFP, consisting of all required forms and related documents as described in this RFP.

“Requests for Additional Services” means if HFS requires additional services outside the agreement, HFS will issue this request through formal communication.

“RFP” means this Request for Proposals in its entirety, including any schedules, attachments, and Addenda that may be issued by HFS in connection therewith.

“RFP Timetable” means the table set out for this RFP process, which provides information on important dates, including the Submission Deadline.

“Submission Deadline” means the final deadline for Proposal submissions, specified in the RFP Timetable.

Scope of Services

The Services to be performed under the Agreement are more particularly described in the attached Scope of Work section. All contracted work from the successful applicant will be entirely completed after two weeks of the event date. Specific instructions about how the Services are to be performed will be included in the Contract Agreement.

Interviews

Homes First Society reserves the right to request additional information from applicants, to interview certain applicants, and to request certain applicants to make oral presentations or further explanations of their proposal. If HFS elects to conduct interviews/oral presentations, initial interviews interviews/oral presentations are expected to be conducted in the timeframe of two to four weeks after the proposal deadline. However, HFS reserves the right at its sole discretion to conduct interviews at any time. Selected applicants may also be asked to make presentations and/or answer questions at one or more meetings of subcommittees of HFS’s Board of Directors.

Notice of Award

If the contract is to be awarded, HFS will issue a Notice of Award. Homes First Society reserves the right to correct inaccurate awards resulting from HFS’s clerical errors. This may include, in extreme circumstances, revoking a Notice of Award already made to an applicant and subsequently awarding the

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Notice of Award to another applicant. Such action by HFS shall not constitute a breach of this RFP by HFS since the Notice of Award to the initial applicant would be terminated and deemed non-existent.

Requests for Additional Services

Following the execution of the Agreement and the satisfaction of all other conditions by the successful applicant, the successful applicant may be requested by HFS on an as needed basis, at HFS's sole discretion, to provide additional services that are related to the Services.

Applicant's Qualifications

Homes First Society may make any investigation deemed necessary to determine the ability of any applicant to perform the services required. Each applicant shall furnish HFS with all such information as may be required for this purpose.

Proposal Preparation and Other Costs

Each applicant shall be solely responsible for all costs and expenses associated with the preparation and/or submission of its proposal, or incurred in connection with any interviews and negotiations with HFS, and HFS shall have no responsibility or liability whatsoever for any such costs and expenses.

Requirements of RFP Response

All proposals submitted must contain the following:

- (a) Title page of the proposal (do not use the title page of this RFP), including the title of the project, the name of the applicant and the date the proposal is being submitted;
- (b) Cover letter, signed by a person authorized to commit the applicant to the contractual arrangements with HFS, which includes the following:
 - (1) The name of the applicant;
 - (2) The legal structure of the applicant (e.g., corporation, joint venture, etc.); and
 - (3) A clear statement indicating that the attached proposal constitutes a firm and binding offer by the applicant to HFS considering the terms and conditions outlined in the RFP and noting any technical exceptions taken thereto; and
- (c) Table of Contents;
- (d) All forms completed and attached:
 - Introduction and Contact Form
 - Business Information Form
 - Issues and Questions to be Addressed Form
 - Proposal Price and Payment Rate Form
 - References Form
 - Acknowledgements Form

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Also please attach:

- (e) A copy of the applicant’s up-to-date certificate(s) of insurance showing all coverage’s required;
- (f) Brief resume (i.e., no more than two pages) of everyone involved in the implementation of the proposal

Applicants may include additional information as an addendum/appendix to its proposal if the applicant thinks that it will assist HFS in evaluating the applicant’s proposal. Applicants should not include information that is not directly related to the subject matter of this solicitation. All forms to be completed and attached are within the following pages.

How the Proposal will be Rated

An internal HFS committee will evaluate proposals against the following weighted criteria. Each area of the evaluation criteria must be addressed in detail in the proposal.

Weight	Evaluation Criteria
30%	Cost (Proposal Price and Payment Rate Form)
20%	Demonstrated Ability to Plan and Implement Services Requested (Issues and Questions to be Addressed Form)
20%	Demonstrated ability to fulfill all requirements of RFP and process (Have all forms been filled out properly, complete signing of the Acknowledgments section and ability to submit a complete packaged response to this RFP)
20%	Qualifications and expertise of staff proposed for Services Requested
10%	Performance references for similar experiences

PART 3

TERMS AND CONDITIONS

1. Communications with HFS Staff and Board Members

Except as otherwise authorized by this Instructions to applicants, during the period while the RFP process is active (i.e., from the date HFS issues the RFP until the date the successful applicant accepts the Notice Of Award), applicants and individuals contemplating or preparing proposals are prohibited from contacting HFS staff or HFS Board of Director members in any manner to discuss the RFP submission process. Applicant RFP submission shall be rejected if any of the outlined communications take place.

2. HFS Reserved Rights

In addition to the other rights in this RFP, HFS reserves, holds and may exercise at its sole discretion, the following rights and options:

- (a) To supplement, amend, or otherwise modify or cancel this RFP with or without substitution of another RFP;
- (b) To issue additional or subsequent solicitations for proposals;
- (c) To conduct investigations of the applicants and their proposals;
- (d) To verify and clarify the information provided pursuant to this RFP and any proposal submission;
- (e) To request additional evidence or documentation to support the information included in any proposal;
- (f) To enter into contract discussion with one or more entities having submitted a proposal; and
- (g) To reject any and all proposals, or parts thereof, and/or to waive any informality or informalities in any of the proposals or the proposal process for the RFP, if such rejection or waiver is deemed in the best interests of HFS.
- (h) To terminate this RFP process at any time prior to the execution of any Agreement.

3. Form of the Agreement

The draft form of the Agreement that HFS intends to sign with the successful applicant will be sent to the successful applicant after they have been issued the Notice of Award.

4. No Representations

Homes First Society does not make any representations or warranties, express or implied, in fact or in law, with respect to the accuracy or completeness of any data, materials or other information that it has provided or will provide to applicants in writing or orally in connection with this RFP process. Neither HFS nor its representatives shall be liable for any claim, action, cost, loss, damage or liability whatsoever arising from or related to any information or advice or any errors or omissions that may be contained in the RFP Information.

5. Mathematical Errors in Submission

Where there is a discrepancy between the total sum of the unit prices and the stated total price, the price which is the lower of the two shall prevail. Applicants shall be entitled to withdraw Proposals containing mathematical errors.

6. Failure to Enter into Agreement

If any Agreement is not reached between the selected applicant by January 4th 2021, HFS may terminate negotiations with that applicant or abort the RFP process and not enter into any Agreement with any applicant. HFS may also invite the next-best ranked applicant to enter negotiations.

7. Conflict of Interest and Prohibited Conduct

Homes First Society in its sole discretion may disqualify an applicant for any conduct, situation or circumstances which constitutes or potentially constitutes a Conflict of Interest.

8. Applicant Not to Communicate with Media

Applicants may not at any time directly or indirectly communicate with the media in relation to the RFP or any Agreement awarded pursuant to the RFP without first obtaining the written permission of the HFS Contact.

9. Confidential Information

All information provided by or obtained from HFS in any form in connection with the RFP either before or after the issuance of the RFP:

- (a) is the sole property of HFS and must be treated as confidential;
- (b) is not to be used for any purpose other than replying to the RFP and the performance of any subsequent contract;
- (c) must not be disclosed without prior written authorization from HFS

10. No Contract until Execution of Written Agreement

The RFP process is intended to identify prospective applicants for the purposes of negotiating an Agreement. No legal relationship or obligation regarding the procurement of any good or service shall be created between any applicant and HFS by the RFP process until the Agreement is executed by HFS and the successful applicant.

11. Termination

This Agreement may be terminated by HFS upon at least fifteen (15) days advance written notice. Upon

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receipt of such written notice from HFS, the successful applicant shall immediately cease work on any and all HFS matters, unless otherwise directed in writing by an authorized representative.

12. Binding Price Estimates

The price estimates in the agreement formed and signed by both parties will be the exact costs for the services from the successful applicant. The final charge will not increase or decrease depending on how the services are delivered. If additional services are added, a separate agreement will be formed and signed from the original contract.

13. Insurance Coverage Requirements

Upon award of the Agreement, the successful applicant shall, at its own expense, obtain and maintain the required insurance throughout the term of the Agreement. Such insurance shall remain in full force and effect for the term of the Agreement. The successful applicant must produce, upon request by HFS, confirmation pursuant to this section, as applicable. Failure to comply within seven days of the request by HFS may result in Agreement termination.

13.1.1 General Liability Insurance

The limits of this insurance shall be for an amount not less than \$5,000,000 with a deductible of not more than \$5,000. General Liability Insurance shall be in the name of the applicant and HFS and its Subsidiaries shall be named as an additional insured under such policy. The Party responsible for a specific claim under this policy shall be responsible for the deductible.

13.1.2 Professional Liability Insurance (Errors and Omissions)

The limits of this insurance shall be for an amount of not less than \$2,000,000 or, alternatively, the successful Applicant shall purchase and maintain in force for the duration of the duration of the project, single project Professional Errors and Omissions Liability Insurance with limits dedicated to the RFP project and having an inclusive limit of not less than \$2,000,000 per claim.

13.2.1 Workplace Safety and Insurance Board (WSIB)

Upon award of the Agreement, it is the responsibility of the successful applicant to ensure HFS is provided a valid Certificate of Clearance from the WSIB or valid independent operator number including proof of personal coverage as identified below:

13.2.2 WSIB Clearance Certificate

Upon award of the Agreement, the successful applicant agrees to maintain its WSIB account in good standing throughout the term of the Agreement. HFS will require the successful applicant to produce a valid Clearance Certificate from WSIB upon expiration during the term of the

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Agreement and prior to any payment under the Agreement. If the successful applicant does not produce confirmation pursuant to this section as applicable, HFS in its own discretion may terminate the Agreement immediately.

14. Staff Identification Upon award of the contract

Applicant agrees that all applicant agents, employees, sub applicants and representatives will carry an identification badge and properly display it at all times while on HFS property.

15. Performance and Completion of Services

All Services and Additional Services shall be performed and completed by the successful applicant as an independent applicant and in a good workmanlike manner consistent and in accordance with:

- (a) Any and all instructions, guidance and directions provided by HFS to applicant;
 - (b) The Contract Documents;
 - (c) Sound organizational review practices;
 - (d) The highest prevailing industry standards applicable to applicants and its performance of the Services and Additional Services hereunder;
 - (e) All Laws And Regulations; and
 - (f) Any Request (as hereinafter defined) pursuant to which such Additional Services are rendered.
- Items (a) through (f) above are hereinafter collectively referred to as the “Standards.”

PART 4 ATTACHMENTS

Scope of Work

The successful applicant will facilitate the planning process for Homes First Society to develop the next strategic plan with the assistance of the Board, Chief Executive Officer and senior staff. The facilitator will be expected to provide expertise and advice on format and process for the strategic planning session. The Facilitator will be required to skillfully guide organized discussions between the Board, CEO and senior staff that will focus on and lead to a final strategic plan. The Facilitator will be expected to develop the framework and text of the strategic plan, along with the assistance of the Board, CEO, and senior staff as needed.

The strategic planning process takes place every three years to establish the goals and objective for the following three-year period. After the event, Homes First management team will develop the operational plan as a roadmap to reach these goals and objectives. Together, these elements will collectively be considered as the Three-Year Strategic Plan. The current plan can be seen here; <https://homesfirst.on.ca/wp-content/uploads/2019/11/9-HF-Strategic-Plan.pdf>

Objectives of the Event

- Continue to build the relationship and mutual respect between the Homes First board of directors and senior management team
- Ensure all voices are heard and all points of view are reflected
- Review and assess the current pillars and goals
- Identify opportunities for growth – are we growth proactive or reactive? And what other resources are needed?
- Agree on core pillars of greatest importance to serving our residents and ensuring the long-term viability of the organization
- Agree on four to five primary goals within each of the core pillars to be completed within the three-year period
- Assign priorities to each goal regardless of timing or cost implications
 - Operational plans and requirements will be addressed by Homes First management team
- Consider ways to track and measure progress towards each goal
- Limit presentation time and maximize discussion time
- Plan the itinerary for the event ensuring all topics are covered and objectives are met
- Facilitate the discussion during the event ensuring all topics are covered and objectives are met
- Engage various staff and board members ahead of the event to gain an understanding for the organization and people participating.
- Record, capture and synthesise all information generated at the event, resulting in a summary report reflecting all conclusions

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- Act as objective observer, listening with fresh ears, reflecting all ideas in the room
- Evaluate and recommend a video conferencing platform
- Plan ways to keep people interested and engaged over the course of a full day video conference. These could be anything from games to guided meditation breaks
- Plan a “fun” package sent to everyone with required contents for the event and elements to support the engagement efforts
- Possibly plan an Anti-Racism and awareness training before the event

Out of Scope: the event is not intended to:

- Develop the operational plan for achieving the goals
- Assess the time and cost implications of the goals
- Establish a balanced score card or other management dashboard
- Evaluate or critique the ideas
- Provide expert insight on the housing or non-profit space
- Advise the group as to optimal directions for Homes First

Attendees

The entire Board of Directors, Management team, and Secretary to the board, and approximately 20 people.

Supporting Work

The participating individuals, including the facilitator, are expected to review and consider the following material in advance of the event:

- Current strategic plan and business plan
- Current organizational chart
- Organization Review consulting report and Organizational Design plan from CEO
- Fundraising plans and available subject matter expert input
- Anti-Racism vision and activities undertaken by Homes First

Annual Operations Plan and Balanced Score Card

The annual Operations Plan will be developed by the management team to achieve the agreed goals and objectives in response to the final Strategic Plan. The Operations Plan will consider budget constraints, practical implications, and scheduling realities.

The Balanced Score Card will be developed in tandem by the board and management team in response to the operational plan.

*Current planning does not require the vendor to support these efforts.



Everyone needs a home

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INTRODUCTION AND CONTACT FORM

Introduction of Applicant and Proposal Abstract (300 words max):	
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Communications concerning this Proposal should be addressed to the applicant at the address set forth below.

Applicant Name:	
Applicant Contact:	
Title:	
Address 1:	
Address 2:	
City, State, Postal Code	
Telephone Number:	
Fax Number:	
E-Mail Address:	



BUSINESS INFORMATION FORM

Applicant/Statement of Qualifications Submitter (hereinafter collectively referred to as “Applicant” must provide the information requested in the following sections.

Applicant Information

Name of Entity:	
Central Office/Headquarters (Full) Address:	
Servicing Office Address (if different from above):	
Name of Parent Company (if any):	
Entity’s Legal Structure:	Corporation, Joint Venture, Partnership, Public Entity, Other
Country in Which Entity is legally organized:	
Year Entity Started:	
Number of Employees:	
Number of Offices:	
Location of Offices (City and Province):	
Brief History of Entity (50 Words max):	
Overview of Entity’s Principal Lines of Work:	



**ISSUES AND QUESTIONS TO BE ADDRESSED
FORM**

Knowledge Capacity and Experience

Describe applicant’s knowledge, capability, and experience in providing services similar to the services addressed in this RFP.

Please describe in 300 words max:

Access to Homes First Society Staff

In the table below, discuss the level of access the applicant would require to HFS staff to complete the Services, including the nature and duration of the access.

Please describe in 300 words max:

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Access to staff files

In the table below, detail any HFS records, files, or other documents the applicant would require to complete the Services. If none are required please state so.

Please describe in 300 words max:

Goals

In the table below, discuss goals that the applicant anticipates as part of their completion of the Services, including the strategy to complete each goal. Applicant will be required to communicate and review each goal with HFS.

Please describe in 300 words max:

Project Schedule and Work Plan

In the table below, describe the process to which the facilitation services will be carried out – as in what are the steps the applicant and HFS will have to take cooperatively to have the facilitation service completed and also please describe how the end result will materialize – for example: will any findings be made into a physical report?

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Please describe in 300 words max:



**PROPOSAL PRICE AND PAYMENT RATE
FORM**

Proposal Price and Payment Rate Form must be completed, or applicants will be disqualified. No changes to this Form are permitted at any time after the Submission Deadline. If a line item is left blank, HFS shall assume there is “NO COST” for that line item and the applicant shall not be able to change its pricing from what is indicated.

Pricing must be in Canadian dollars with separated tax but must include all additional costs and expenses, including but not limited to licenses, travel and sundry disbursements.

Upon completion of the Services, applicants shall render a bill to HFS for the full amount of the Lump Sum as specified in the Grand Total of this table within 30 days after the completion of the Services.

Name	Price	Subtotal
Salary Expenses:		
Services:		
Ex: Planning/Research/Outreach		
Ex: Design, consultation		
Ex: Development		
Supplies:		
Indirect Costs:		
	Subtotal:	
	Tax:	
	Grand Total:	

I/We the undersigned offer the following price(s) for the work listed in this proposal. All amounts are for complete work, in accordance with applicable contract requirements and include all overhead and profit mark-up.

Complete and sign the following:

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Name of Applicant:		
Legal Name (if different from above):		
Name of Authorized Signing Officer:		
Title:		
Signature:		
Date:		



REFERENCES FORM

The applicant must include at least one (1) to three (3) references for which the applicant has successfully provided services on projects similar in nature, size, and scope to the current RFP. These references must be from projects that were completed within the past five (5) years.

Company Name (your client):		Contact Name:	
Address:		Phone Number:	
Project Name:	Beginning Date of Project:	End Date of Project:	
Description of project size, complexity, and applicant’s role in the project:			

Company Name (your client):		Contact Name:	
Address:		Phone Number:	
Project Name:	Beginning Date of Project:	End Date of Project:	
Description of project size, complexity, and applicant’s role in the project:			

Company Name (your client):		Contact Name:	
Address:		Phone Number:	
Project Name:	Beginning Date of Project:	End Date of Project:	
Description of project size, complexity, and applicant’s role in the project:			



ACKNOWLEDGEMENTS FORM

Applicant must review, acknowledge, and agree to the terms and conditions listed in PART 2 Proposal Submission Information and PART 3 Terms and Conditions for Proposals. In signing this form, applicants are agreeing to reading and acknowledging all indicated items below:

- 1. Brief**
- 2. RFP Projected Timeline**
- 3. Definitions**
- 4. Scope of Services**
- 5. Interviews**
- 6. Notice of Award**
- 7. Requests for Additional Services**
- 8. Applicant's Qualifications**
- 9. Proposal Preparation and Other Costs**
- 10. Requirements of RFP Response**
- 11. How the Proposal will be Rated**
- 12. Communications with HFS Staff and Board Members**
- 13. HFS Reserved Rights**
- 14. Form of the Agreement**
- 15. No Representations**
- 16. Mathematical Errors in Submissions**
- 17. Failure to Enter into The Agreement**
- 18. Conflict of Interest and Prohibited Conduct**
- 19. Applicant Not to Communicate with Media**
- 20. Confidential Information**
- 21. No Contract until Execution of Written Agreement**
- 22. Termination**

23. Binding Price Estimates

24. Insurance Coverage Requirements

25. Staff Identification

26. Performance and Completion of Services

And the additional:

27. Ability to Provide Deliverables

The applicant has carefully examined the RFP documents and has a clear and comprehensive knowledge of the deliverables required under the RFP. The applicant represents and warrants its ability to provide the deliverables required under the RFP in accordance with the requirements of the RFP for the rates set out in the PROPOSAL PRICE AND PAYMENT RATE FORM and has provided a list of any sub-contractors to be used to complete the proposed agreement in the Business Information Form.

28. Conflict of Interest extended

For the purposes of this RFP, the term “Conflict of Interest” means:

(a) in relation to the RFP process, the applicant has an unfair advantage or engages in conduct, directly or indirectly, that may give it an unfair advantage, including but not limited to:

- (i) having, or having access to, confidential information of HFS in the preparation of its Proposal that is not available to other applicants,
- (ii) communicating with any person with a view to influencing preferred treatment in the RFP process (including but not limited to the lobbying of decision makers involved in the RFP process), or
- (iii) engaging in conduct that compromises, or could be seen to compromise, the integrity of the RFP process; or

(b) in relation to the performance of its contractual obligations contemplated in the Agreement that is the subject of this procurement, the applicant’s other commitments, relationships, or financial interests

- (i) could, or could be seen to, exercise an improper influence over the objective, unbiased and impartial exercise of its independent judgment, or
- (ii) could, or could be seen to, compromise, impair or be incompatible with the effective performance of its contractual obligations.

(c) has a fiduciary, family, directorship, shareholder, or any other non-arm’s length relationship with any other company potentially bidding on this RFP.

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(d) has engaged any ex-HFS employee as employees, advisers, or in any other capacity and (a) who have participated in the preparation of the Proposal; AND (b) any personnel part of the applicant entity that has ever been employed by HFS or is currently employed in any capacity by HFS.

If the applicant needs to declare an actual or potential Conflict of Interest, the applicant must set out details of the actual or potential Conflict of Interest below:

Conflict of Interest is as follows:

29. Following HFS’s Code of Conduct and Anti-Racism Policies

HFS has a Code of Conduct and an Anti-Racism policy. It must be followed in the process of this facilitation process. Please see attached policy documents

CONFIRMATIONS:

I hereby confirm reading, acknowledging, and agreeing to sections in Part 2 Proposal Submission and Part 3 Terms and Conditions and to the additional terms above 27, 28 and 29.

I confirm that that any real or possible conflicts of interest as outlined have been disclosed in the form above.

I confirm that the applicant, or any of its shareholders, directors, officers, subsidiaries, or affiliates, is not a party to any current litigation, or anticipated litigation, with HFS or its subsidiaries.

I confirm having read and accepted all addenda issued by HFS prior to the Deadline for Issuing Addenda. I confirm that each of the Forms listed below has been reviewed and/or completed (as indicated) and is enclosed with the submission.

Form	Initial to Acknowledge
# of Addenda Received = _____ (specify number)	
1. Overview of RFP Package Documents	
2. How the Proposal will be Rated	
3. Introduction and Contact Form	
4. Business Information Form	
5. Issues and Questions to be Addressed Form	
6. Proposal Price and Payment Rate Form	
7. References Form	

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I confirm that I have authority to bind the applicant, and attest to the accuracy of the information provided in this Proposal.

Signature of Applicant Representative

Applicant Representative Name, and Title:	
Date:	
Applicant Signature:	
Witness Name and Title:	
Witness Signature:	