

## Call for Proposal

**“Research and report on strengthening service coordination currently among service provider networks”**

**Return Completed Proposal to:** Madge Richardson  
Local Employment Planning Council  
107B Johnson Avenue  
Thunder Bay, Ontario  
P7B 2V9

**Closing Date:** **August 15, 2017**

**Closing Time:** **4:30 p.m. EST**

All submissions must be clearly marked with “Research and report on strengthening service coordination currently among service provider networks”, closing date and closing time.

**Issuing Organization:** **Local Employment Planning Council (LEPC)**  
c/o Madge Richardson, Executive Director  
North Superior Workforce Planning Board

In signing below, the applicant certifies to have read, understood, and agrees with the Scope of Work, Proposal Requirements and Terms and Conditions contained herein.

This section must be completed by a representative(s) of the applicant’s organization who has legal signing authority to enter into contractual agreements.

**(Please Print)**

Organization Name: \_\_\_\_\_

Address: Street: \_\_\_\_\_ City: \_\_\_\_\_

Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Telephone # (\_\_\_\_) \_\_\_\_\_ Fax # (\_\_\_\_) \_\_\_\_\_

Email Address \_\_\_\_\_

Contact Person: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Signature: \_\_\_\_\_

Position: \_\_\_\_\_ Position: \_\_\_\_\_

**TABLE OF CONTENTS**

---

**Background.....Page 3**

**Project Rationale and Objectives .....Page 4**

**Scope of Work.....Page 5**

**Proposal Requirements.....Page 8**

**Proposal Response Format.....Page 10**

**Evaluation Criteria .....Page 10**

**Terms and Conditions .....Page 11**

## TERMS OF REFERENCE

---

### 1.0: BACKGROUND

#### 1.1: Overview of Local Employment Planning Councils

Local Employment Planning Councils (LEPCs) are being piloted to improve labour market conditions in local communities. The Ministry of Advanced Education and Skills Development (formerly Ministry of Training Colleges and Universities) will first pilot Local Employment Planning Councils in 8 communities across the province. The pilot projects are currently underway for the period of June 1, 2017 to September 30, 2018.

The North Superior Workforce Planning Board is now operating under this new funding agreement to pilot the Local Employment Planning Council (LEPC) for the Thunder Bay District. The purpose of the LEPC pilot is to create a network of intermediaries aimed at improving conditions in local communities through improved collection and dissemination of local labour market information, and community engagement to drive local approaches in the planning and delivery of employment and training services.

#### 1.2: What Local Employment Planning Councils Do

Local Employment Planning Councils (LEPC) support the improvement of labour market condition in local communities through:

- **Labour Market Information and Intelligence:** expanding current understanding of local labour market issues and improving access to labour market information.
- **Integrated Planning:** supporting integrated planning by serving as a central point of contact and key facilitator for linking employers, service providers, other government and community stakeholders to identify and respond to labour market and workforce development challenges and opportunities.
- **Service Coordination for Employers:** acting as a hub for connecting employers, industry associations, sector groups and other employer groups with appropriate employment and training services to address their workforce development needs. Working with local employment and training service providers and the network to coordinate services to employers.
- **Research and Innovation:** collaborating with community stakeholders to develop projects related to research and piloting of innovative approaches.
- **Sharing of Best Practices and Promising Approaches:** working with provincial and community organizations, including other Local Employment Planning Councils to identify and share best practices.
- The LEPC pilots are required to create an annual community labour market planning report which will assist to inform the Ministry in service delivery based on solid evidence.

### **1.3: Local Employment Planning Council for the Thunder Bay District**

The Local Employment Planning Council for the Thunder Bay District is supported by the North Superior Planning Board. This project is funded in part by the Government of Canada and the Government of Ontario.

## **2.0: PROJECT RATIONALE AND OBJECTIVES**

### **2.1: PROJECT RATIONALE**

At a focus group in March of 2017 led by the LEPC, several key stakeholders among Employment Ontario service organizations in Thunder Bay identified service coordination for client referral as a critical issue. Enhancing referral coordination across these agencies is seen as necessary to increase service uptake and client outcomes.

The coordination and integration of employment services and training across agencies is considered to be a critical component for increasing efficiency and access to quality services for clients. Following a review of service integration strategies in Australia, Neale and colleagues (2012) argued that integration could have a positive impact, if it is implemented at a local level and takes into account local conditions. Aitken and von Treuer (2013) outline a number of leadership and organizational competencies that contribute to successful service integration. One of these is the existence of strong prior networks within and across relevant sectors, with effective professional relationships that can handle complex and sensitive issues.

### **2.2: OBJECTIVES OF THE OVERALL PROJECT**

The proposed project will respond to the need identified by local Employment Ontario service organizations by examining current approaches to client referral and comparing those to a “situation table” approach. Effects of the two approaches on client outcomes and self-reported satisfaction from both clients and service providers will be gathered. Knowledge will be gained that will result in more effective models of service coordination for EO clients with complex needs.

### **2.3: METHODOLOGY**

A meeting will be held of the Employment Service Providers and other interested service providers with the research team to develop the situation table approach and plan for a pilot test with 5-10 individuals who are employable and seeking employment but are challenging to serve due to mental health and/or housing challenges. Details of the research methods will also be developed collaboratively.

Two groups of EO clients will be identified by the EO service providers: one group of 5-10 individuals will be selected for the situation table approach and 5-10 individuals for the counsel and refer as usual approach. The two groups will be matched as closely as possible on demographics and level of service need.

The EO service counsellor will deliver a structured interview to all clients at two Times, T1 and T2. This interview will probe several indicators of well-being or quality of life, employment readiness, connectedness with the service system, and the individual's social support network. T1 will be held soon after the individual enters the EO service system, and T2 will be held within 2 months or at the end of the individual's service plan with the EO system and after referrals have been made. For those in the situation table group, T2 will be after the individual's team has met and the individual has begun receiving services at other organizations.

Background information such as demographics and employment situation will be gathered.

All data will be shared with the research team in an anonymized format using a participant code.

An anonymous online survey will be developed by the research team and made available to all clients in the study after the T2 interview to gather anonymous feedback on the services received and their satisfaction with their referred services and the degree to which they perceived the service network to be seamless.

A second anonymous online survey will be developed by the research team and made available to the individual counsellors or service provider representatives to gather feedback on the two approaches.

Change from T1 to T2 in the two groups of clients on the indicators of well-being and employment readiness will be compared statistically. Egocentric social network maps will be generated for each client and the properties of these networks before and after services will be compared for the two groups. Client survey data will be analyzed descriptively and compared between the two groups. Service provider survey data will be analyzed descriptively.

Findings will be presented to a focus group of 5-10 stakeholders from the service network to assist with interpretation. The stakeholders' satisfaction with the research process and findings will also be gathered at this time. The deliverable research report will include statistics, network maps, interpretation and analysis, as well as a set of recommendations for pursuing further service coordination.

### **3.0: SCOPE OF WORK**

#### **3.1: ROLES AND RESPONSIBILITIES OF THE CONTRACTOR**

The Contractor oversees all aspects of the project and has financial and reporting responsibility to the Local Employment Planning Council. The successful contractor will ensure that standard accounting practices are followed in the handling of funds for this project. The project lead will provide proof of insurance coverage at a minimum of \$2 Million along with a certificate of insurance that identifies the Local Employment Planning Council and North Superior Workforce Planning Board as additional insured under the policy for the duration of the project.

### 3.1.1: SPAN AND RANGE

The North Superior Workforce Planning Board- Local Employment Planning Council (LEPC) catchment area is the Thunder Bay District. This includes the following communities:

- Animbiigoo Zaag'igan Anishinaabek (Lake Nipigon Ojibway)
- Aroland First Nation
- Biigtigong Nishnaabeg (Ojibways of the Pic River First Nation)
- Biinjitiwaabik Zaaging Anishinaabek (Rocky Bay First Nation)
- Bingwi Neyaashi Anishinaabek (Sandpoint First Nation)
- Conmee
- Dorion
- Eabametoong First Nation (Fort Hope)
- Fort William First Nation
- Gillies
- Ginoogaming First Nation
- Greenstone
- Kiashke Zaaging Anishinaabek (Gull Bay First Nation)
- Lac des Mille Lac First Nation
- Long Lake #58 First Nation
- Manitouwadge
- Marathon
- Marten Falls First Nation
- Neebing
- Neskantaga First Nation (Landsdownhouse)
- Nibinamik First Nation (Summer Beaver)
- Nipigon
- O`Connor
- Oliver Paipoonge
- Pawgwasheeng (Pays Plat First Nation)
- Pic Moberg First Nation
- Red Rock
- Red Rock Band
- Schreiber
- Shuniah
- Terrace Bay
- Thunder Bay
- Thunder Bay, Unorganized
- Webequie First Nation
- Whitesand First Nation

### 3.1.2: CONSULTATION

Once selected, the Consultant/Consulting Firm will consult with the Executive Director of the North Superior Workforce Planning Board and the Project's Steering Committee (part of the LEPC) on the implementation of the project and the setting of agreed measures of impact and success.

The consultant/consulting firm will execute an agreed upon collaborative approach as outlined in Methodology.

### 3.1.3: DELIVERABLES

The Consultant/Consulting Firm will examine the current approach and referral network and compare that to a pilot test of a "situation table" approach. This is a collaborative, team-based approach in which service providers representing various particular needs (addiction, mental health, housing, and employment) meet together to brainstorm a service plan with one particular client, and then each service provider follows up to address their particular aspect.

Knowledge will be gained of how employment readiness, self-reported well-being, social networks, and connectedness with community services changes from before to after services are provided (approx. 2 months) in a group of clients receiving the situation table approach and a group receiving the referral as usual approach to services.

A follow up survey with the clients will assess their satisfaction with services received, and a survey of the EO and other service provider representatives will provide insight into the effectiveness of the two approaches, and

suggestions for improvement from their perspective. Outcomes will include knowledge of the effectiveness of the current and alternative, “situation table” approaches and will result in recommendations for continuing with service coordination efforts in complex cases.

### **3.1.4: TIMELINES**

The Consultant/Consulting Firm will work with the LEPC to ensure that timelines within the work plan are met.

### **3.2: ROLES AND RESPONSIBILITIES OF THE CLIENT**

The LEPC will:

- Monitor the work of the Consultant/Consulting Firm
- Provide direction through initial and subsequent meetings with the Consultant/Consulting Firm
- Monitor the financial claims against the achievement of project milestones
- Provide the Consultant/Consulting Firm with feedback from the stakeholders and partners involved
- Respond in a timely manner via e-mail or telephone to all Consultant/Consulting Firm enquiries

### **3.3: GENERAL REQUIREMENTS**

The successful applicants, Consultant/Consulting firm must be a registered business licensed to work in Ontario to enter a contractual agreement with the North Superior Workforce Planning Board. The preferred applicant should have prior work experience working with Workforce Planning Boards and prior knowledge of employment services and other social service delivery agencies/organizations within the Thunder Bay district. The applicant must provide proof of references as outlined in this document.

### **3.4: PROJECT MANAGEMENT**

The LEPC will be responsible for managing all aspects of the project including:

- Development of the administrative procedures including ongoing office, bookkeeping and management functions necessary to ensure proper administration of the project.
- LEPC or designate will have the responsibility for communicating and advising the Consultant/Consulting Firm of any changes in the direction of the project relating to content, objectives or outcomes.

### **3.5: TIME LINE AND CRITICAL DATES**

<b>Description</b>	<b>Due Date</b>
<b>Project Duration</b>	<b>July 2017–September 2018</b>
<b>RFP Release Date</b>	<b>July 24, 2017</b>
<b>Question Due Date</b>	<b>July 31, 2017</b>

<b>Question Response Date</b>		<b>August 4, 2017</b>
<b>Proposal Due Date</b>		<b>August 15, 2017</b>
<b>Review of Qualifications</b>		<b>August 16-17, 2017</b>
<b>Telephone Interviews</b>		<b>August 17-18, 2017</b>
<b>Reference Checks</b>		<b>August 21-22, 2017</b>
<b>Contract Awarded</b>		<b>August 25, 2017</b>
<b>Draft Report Due</b>		<b>June 30, 2018</b>
<b>Changes/Recommendations</b>		<b>July 13, 2018</b>
<b>Final Report Due</b>		<b>August 3, 2018</b>
<b>Design Work, Printing &amp; Distribution</b>		<b>September, 2018</b>

#### **4.0: PROPOSAL REQUIREMENTS**

The Consultant/Consulting Firm must provide the following mandatory information. Failure to provide this information may be cause for the proposal to be rejected.

##### **4.1: WORK PLAN**

A work plan will be prepared that clearly indicates the manner in which the Consultant/Consulting Firm will coordinate the scope of work including;

- Work steps and timeline
- Project management and any sub-contracting of work to be performed

##### **4.2: GENERAL APPROACH AND METHODOLOGY**

The Consultant/Consulting Firm will provide a description of the general approach and methodology designed to meet the objectives of the project and the style of the final product.

##### **4.3: QUALIFICATION SUBMISSION**

The proposal should include the following:

1. **Executive Summary**
2. **Project Management Approach**
3. **Methodology**
4. **Implementation Plan**
5. **Details & Itemized Pricing**
6. **Appendix "A": References**
7. **Appendix "B": Project Team Staffing (including curriculum vitae)**
8. **Appendix "C": Company Overview**
9. **Appendix "D": Description of similar projects undertaken, including the scope of work conducted and a sample of prior work produced for a client.**

##### **4.4: REFERENCES**



The Consultant/Consulting Firm shall provide a minimum of three (3) letters of reference and/or the names of persons who may be contacted, positions of person, addresses and telephone numbers where services similar in scope to the requirements of this RFP have been provided. A letter of consent which gives permission to the North Superior Workforce Planning Board/Local Employment Planning Council to contact the clients must be included.

#### **4.5: COST PROPOSAL**

The Consultant/Consulting Firm shall submit a cost proposal including a detailed list of costs itemized per task. **The total budget, including HST and any out-of-pocket expenses (including travel) not to exceed \$20,000.** There will be no direct payment for the preparation and submission of proposals in response to this Request For Proposal.

#### **Proposals must satisfy and will be assessed on the following criteria.**

##### **Managerial and Organizational**

- State your approach to the project in sufficient detail to demonstrate your understanding of the requirements and your ability to successfully fulfill the requirements.
- Resources to be applied to the work including human resources (provide resumes of key personnel). In this regard, the proposal should include information relating to qualifications and educational requirements.
- Provide details of previous experience and contracts for similar projects.
- Provide a list of at least three (3) references with contact information.

##### **Financial**

- The lot price for the completion of the project components must **not exceed \$20,000.00 including HST** and be accompanied by a detailed breakdown of the project tasks, per diems, assigned personnel rates and hours estimated for the work. This amount will include expenses associated with traveling to and from the LEPC catchment areas during the course of the project. Payment schedules and conditions must be shown.

##### **Technical**

- Your proposal must demonstrate an understanding of the scope of work, including the desired critical outcomes of an immediate benefit (incentive) for participating job seekers and the foundation for an ongoing relationship between the job seeker, their community, and the labour market.
- You should include a schedule for completion of the project.
- A detailed description of the proposed methodology, the technical methods to be used in the performance of the project must also accompany submissions.

##### **Evaluation Criteria**

Proposals will be evaluated using a best value approach considering both merit and price. They will be assessed on a point rating system for the following:

Managerial and Organizational	50 points
Technical	100 points
Financial	50 points

Neither the qualifying proposal which scores the highest number of rating points, nor the one which contains the lowest price will be necessarily accepted. Consultant selection will be based on the best overall value to the LEPC in terms of merit and price ratio.

## **Additional Conditions**

The selection committee reserves the right to negotiate changes in the technical content of the most satisfactory proposal and, if necessary, interview key personnel.

All consultants shall enter into a contract with the LEPC. The contract shall indicate that work to be undertaken shall be one to the satisfaction of the LEPC according to the terms of reference and for the amount agreed to.

## **5.0: SUBMISSION REQUIREMENTS**

### **5.1: PROPOSAL RESPONSE FORMAT**

The proposal must be submitted as described below. If the proposal is not submitted in the required format, the proposal will not be considered.

1. The proposal shall be submitted in person to the address below or electronically emailed to [mrichardson@nswpb.ca](mailto:mrichardson@nswpb.ca)
2. Proposals and reference materials presented must be written in English.
3. Proposals shall include a signed copy of Page 1 of this RFP confirming authority to submit.
4. Proposals shall include a confirmation statement regarding Conflict of Interest as per Section 7.0.
5. Proposals are to be prepared on standard 8.5" x 11" paper, in a report cover. Foldouts containing charts, spreadsheets, and oversize exhibits are permissible. Manuals and other reference documentation may be bound separately.
6. Proposals must respond to the RFP requirements (Section 4.0) by restating the number and text of the requirement in sequence.
7. Proposal and information submitted with proposals will not be returned to unsuccessful applicants.
8. Proposals shall be based only on the material contained in this RFP. All responses to the requirements in Section 4.0 contained in this RFP must clearly state whether the proposal will satisfy the referenced requirements and the manner in which the requirements will be satisfied.

### **5.2: SUBMISSION DUE DATE**

The proposal is to be received at the following address by 4:30 p.m. (EST) on Tuesday, August 15, 2017.

**Attention: Madge Richardson, Executive Director**  
**Local Employment Planning Council**  
**c/o North Superior Workforce Planning Board**  
**107B Johnson Avenue**  
**Thunder Bay, Ontario P7B 2V9**

## **6.0: EVALUATION CRITERIA**

An Evaluation Team composed of representatives of the Local Employment Planning Council will review the proposals. The criteria listed below will be used to evaluate proposals for the purpose of ranking them in relative position based on how fully each proposal meets the requirements of this RFP.

Criteria	Weight
<b>Comprehension of Project</b>	
<ul style="list-style-type: none"> <li>• Understanding of project requirements</li> <li>• Ability to meet timelines</li> </ul>	<b>30%</b>
<b>Relevant Experience and Qualifications</b>	
<ul style="list-style-type: none"> <li>• Past performance with similar projects (experience)</li> <li>• Key Personnel</li> <li>• References</li> </ul>	<b>30%</b>
<b>Presentation of Proposal</b>	
<ul style="list-style-type: none"> <li>• Clarity of written proposal</li> <li>• Methodology and general approach</li> <li>• Creative and innovative approaches to the project</li> </ul>	<b>20%</b>
<b>Cost</b>	
<ul style="list-style-type: none"> <li>• Total cost for project itemized by tasks</li> </ul>	<b>20%</b>
<b>MAXIMUM</b>	<b>100%</b>

## 7.0: TERMS AND CONDITIONS

### 7.1: QUESTIONS PERTAINING TO RFP

Applicants will be able to submit questions pertaining to this Call for Proposal in the following manner only, to:

Madge Richardson, Executive Director  
Telephone: 807.346.2943

Email: [mrichardson@nswpb.ca](mailto:mrichardson@nswpb.ca)

Questions will be accepted until 4:00 p.m. on Monday, July 31, 2017.

Responses will be available by telephone or return email by August 4, 2017 at 4:30 p.m. (EST). This will be the only opportunity for applicants to ask questions about this RFP.

Any attempt on the part of the applicant or any of its employees, agents, contractors or representatives to contact any person other than the designated contact (Madge Richardson) with respect to this RFP, will be grounds for disqualification. Without limiting the generality of the foregoing, no attempt will be made to contact any member of the evaluation team, any expert or other adviser assisting the evaluation team.

In such event, and without liability, the Local Employment Planning Council may, in its sole and absolute discretion, in addition to any other remedies available by law, revoke the applicant's status as an applicant and reject any potential or actual proposal submitted by the applicant.

### 7.2: CANCELLATION

The Local Employment Planning Council reserves the right to amend terms of this RFP, to circulate various addenda, or to withdraw the RFP at any time, regardless of how much time and effort applicants have spent on their responses.

**7.3: APPLICANT’S ACCEPTANCE OF RFP TERMS AND CONDITIONS**

Each applicant, by submitting a Proposal, signifies that the applicant has read, completely understands and accepts the Terms and Conditions of the RFP in full.

**7.4: REJECTION OF PROPOSAL**

The Local Employment Planning Council reserves the right in its sole discretion to reject any or all Proposals which do not adhere to the rules, schedule or any other part of this RFP.

**7.5: IRREVOCABLE**

All Proposals will be irrevocable for a period of thirty (30) days from the closing date of the RFP, or until the RFP is counter-signed and returned to the successful applicant, whichever comes first.

**7.6: FREEDOM OF INFORMATION**

Applicants are advised and acknowledge that all replies received in response to this RFP will be subject to the Freedom of Information and Protection of Privacy Act, R.S.O. 1990, c.F.31. This acknowledgement shall not be construed as a waiver of any right to object to the release of any information or documents.

**7.7: CONFIDENTIALITY**

This RFP or any portion thereof, is strictly confidential and is not to be copied or used for any purpose other than the submission for proposal to the Local Employment Planning Council.

**7.8: CONFLICT OF INTEREST**

Each applicant must include in its proposal submission confirmation of the following:

That the applicant does not and will not have any conflict of interest (actual, perceived or potential) in submitting its proposal or, if selected, with the contractual obligations of the applicant as Contractor under the Agreement. Where applicable, an applicant must declare in its proposal submission any situation that may be a conflict of interest in submitting its Proposal or, if selected, with the contractual obligations of the applicant as Contractor under the Agreement.

The proposal submission of any applicant must be disqualified where the applicant fails to provide confirmation of the foregoing or makes misrepresentations regarding any of the above. Further, the Local Employment Planning Council shall have the right to rescind any contract with the selected applicant in the event that the Local Employment Planning Council, in its sole discretion, determines that the selected applicant has made a misrepresentation regarding any of the above, in addition to or in lieu of any other remedies that the Local Employment Planning Council has in lay or in equity.

**7.9: PAYMENT SCHEDULE**

<b>Award of Contract</b>	<b>40%</b>
<b>Draft Report Submitted</b>	<b>25%</b>
<b>Final Report Submitted</b>	<b>25%</b>
<b>Final approval by Committee &amp; Funders</b>	<b>10%</b>