



**WoodGreen Community Services**  
**Request for Proposal (RFP)**  
**Evaluation Framework Development for Measuring the Impact  
of the Toronto West Local Immigration Partnership in the Newcomer Sector**

**Request for Proposal (RFP) Number:** WGCS-09-2022-TWLIP-001

**Issue Date:** September 12, 2022

**RFP Contact:**

WoodGreen Community Services  
[admin@torontowestlip.ca](mailto:admin@torontowestlip.ca)

## IMPORTANT DATES

|  |                    |
|--|--------------------|
| Issue Date of RFP                                      | September 12, 2022 |
| Deadline for Vendor Questions                          | September 26, 2022 |
| Responses to Questions                                 | October 6, 2022    |
| Bid Submission Date                                    | October 17, 2022   |
| Notification of Preferred Vendor & Contract Award Date | Oct 28, 2022       |
| Consultant Begins Work                                 | November 7, 2022   |
| Work Completed   | March 31, 2023     |

### 1.1 INVITATION TO VENDORS

This Request for Proposal (the “RFP”) is issued by WoodGreen Community Services and invites prospective Vendors to submit a proposal for the opportunity to develop a plan outlining how the Toronto West Local Immigration Partnership (TWLIP) can best evaluate its work in the newcomer serving sector in West Toronto to support newcomers in achieving successful settlement outcomes.

By way of background, Local Immigration Partnerships (LIPs) are federally funded planning bodies focused on developing and implementing local strategies that coordinate and enhance service delivery to newcomers while promoting innovation and efficient use of resources. TWLIP is a consortium of three agencies, Delta Family Resource Centre, Rexdale Women’s Centre and WoodGreen Community Services. It brings together approximately 25 members, including settlement and social service agencies, school boards and educational institutions, community health clinics, and employment organizations among others.

In the past 3 - 4 years, TWLIP has identified key outcomes for newcomers and strategies for driving those outcomes, developing a comprehensive [Theory of Change \(ToC\)](#). Earlier this year, the TWLIP conducted a survey of newcomer clients to see how they are progressing towards their settlement goals in the 5 identified key outcome areas in the ToC (see link above for 5 Long Term Outcomes for Newcomers in ToC).

The TWLIP is now seeking a consultant able to build on strategic initiatives and develop a plan for next steps, including a comprehensive evaluation framework. Ideally, the selected Vendor will incorporate the existing survey to develop a fulsome process for measuring TWLIP progress in supporting and improving outcomes for newcomer clients in Toronto West.

**The budget range for this project is \$25,000 to \$30,000 inclusive of HST.**

Note: Appendix D – References: vendor submissions must reference similar work completed within the previous five (5) years. References for work submitted older/longer than this will be disqualified.

This RFP sets out the requirements for the Vendor’s proposal and specifies the evaluation criteria and Vendor selection process for this phase. Vendors must demonstrate a thorough understanding of the requirements. The objective in issuing this RFP is to obtain the best overall value, considering quality, service, cost and other relevant factors.

## **1.2 TERMS AND CONDITIONS**

### **1.2.1 Terms of Agreement**

The Term of this Agreement shall commence upon the contract award date or such date as may be agreed between the parties, and continue until all requirements are met and deliverables are approved by WoodGreen Community Services (WGCS), unless terminated earlier. WGCS is under no obligation to extend the scope of the work or engage the Vendor for any subsequent work.

### **1.2.2 Vendor Responsibility**

All proposals are irrevocable after the official closing time. In the event the selected Vendor fails to accept the contract award, WGCS reserves the right to accept the next qualified bid or any bid which meets the RFP specifications.

Proposals received by WGCS after the date specified may not be considered. It is the responsibility of Vendors to allow sufficient time to ensure delivery of their proposals to the designated location prior to the stipulated closing time/ date. All information required in procurement document forms must be provided to constitute a responsive (valid) bid.

### **1.2.3 Queries during the RFP**

The Vendor will base their proposal on WGCS' RFP documents. It is the responsibility of the Vendor to obtain clarification of any terms, conditions or technical requirements contained in the RFP.

Vendors shall promptly examine all the documents comprising this RFP and (a) shall report any errors, omissions, or ambiguities and (b) may direct questions or seek additional information in writing by email on or before the Deadline for Questions to WGCS' RFP Contact – [admin@torontowestlip.ca](mailto:admin@torontowestlip.ca).

WGCS is under no obligation to provide additional information but may do so at its sole discretion. It is the responsibility of the Vendor to seek clarification from WGCS' RFP Contact on any matter it considers to be unclear. WGCS shall not be responsible for any misunderstanding on the part of the vendor concerning this RFP or its process.

Vendors and their representatives may not contact individuals employed or engaged by any member of WGCS (this includes members of the board of directors and/or any committee), other than WGCS RFP Contact, concerning matters regarding this RFP. Only information received by the WGCS' RFP Contact will be considered in the RFP process. All such communications must be in writing via email. Any Vendor that does not follow these instructions may be disqualified.

### **1.2.4 Amendments to the RFP**

This RFP may be amended only by an addendum in accordance with this section. Answers to questions or requests from Vendors will be responded to by email, and when necessary an addendum will be issued to all Vendors via those public e-tendering websites in which this RFP has been posted. If WGCS for any reason, determines that it is necessary to provide additional information relating to this RFP, such information will be communicated to all Vendors by way of addenda through the public e-tendering websites in which this RFP has been posted. Each addendum shall form an integral part of this RFP. Vendors are responsible for obtaining all addenda issued by WGCS.

### **1.3 EVALUATION OF RESPONSES**

Incomplete proposals, namely those that fail to comply substantially with the Mandatory Requirements, Specifications, and/or Specific Terms and Conditions, will be eliminated from further consideration in the evaluation process.

Vendor proposals will be evaluated based on the criteria outlined in Section 3.1 as per weight values indicated in the Evaluation Overview.

WGCS reserves the right to request clarifications and/or confirmations from any or all Vendors regarding any aspect of the proposal. In the event such clarifications and/or confirmations are requested, WGCS' RFP Contact will make the request. The request for clarification and/or confirmation will be directed to the individual named as the Vendor's contact in their proposal. A written response to each such communication is required from the Vendor.

Reference checks may be done to complete the evaluation.

### **1.4 ACCEPTANCE OF PROPOSALS AND SELECTION**

WGCS reserves the right to select based solely on its assessment.

WGCS reserves the right to award a contract or contracts in whole or in part.

WGCS reserves the right not to accept the LOWEST or ANY proposal submitted.

### **1.5 PROPOSAL PREPARATION COSTS**

All costs incurred in the preparation and presentation of the Vendor's proposal shall be the sole responsibility of the Vendor. All supporting documentation and manuals, if applicable, submitted with the proposal will become the property of WGCS unless requested otherwise by the Vendor at the time of submission.

### **1.6 VENDOR'S CONFIDENTIAL MATERIAL**

Material submitted by any Vendor that is to be considered as confidential must be clearly marked as such.

### **1.7 DEBRIEFING**

Vendors may request a debriefing after receipt of a notification of award. All requests must be made in writing to WGCS' RFP Contact and must be made within forty-five (45) days of notification of award. The debriefing will include an outline of the reasons the proposal was not successful, referring to the evaluation criteria. The confidentiality of information relating to all other proposals will be protected. Any debriefing provided is not for the purpose of providing an opportunity to challenge the procurement process.

### **1.8 CONTRACT OBLIGATIONS**

Upon acceptance of a proposal, or any part thereof, either by the issuance of an official order, or otherwise, the Vendor(s) shall, if requested, execute and enter into a formal contract that is satisfactory to WGCS including appropriate protections for the legitimate interests of WGCS such as, but not limited to, warranties respecting performance, to properly secure the resulting contract, and to embody indemnity and related provisions that are deemed to be required to protect WGCS.

### **1.9 FINAL CONTRACT - CHANGES, DELETIONS AND ADDITIONS**

On completion of the evaluation process, a Vendor may be selected with whom discussions will be undertaken to refine the details of the contract for all or portions of a proposal chosen by WGCS. Discussions may take the form of adding, deleting, or modifying certain requirements based on the response to the procurement document with appropriate adjustments.

WGCS reserves the right to negotiate price and work schedule amendments with the successful Vendor.

If it appears that the timely signing (within 30 days of award) will not take place as a result of non-acceptance of WGCS' terms and conditions, or through the need for extensive legal review to assess suggested terms, WGCS reserves the right to award the contract to the next most-qualified Vendor or to otherwise terminate the selection process.

Modifications required after execution of the contract will be governed as prescribed in Section 1.10 hereunder.

### **1.10 CHANGES**

WGCS, without invalidating the contract, may make changes by altering, adding to, or deducting from the work, the contract sum being adjusted accordingly. All such work shall be executed under the conditions of the original contract. Such change order shall not be regarded to imply an extension of the time for completion, unless specifically stipulated in the change notice. No change shall be made unless in pursuance of a written order from WGCS and no claim for an addition to the contract sum shall be valid unless so stipulated in the change notice.

The value of any change notice shall be determined as follows:

- i. Quotations submitted in response to the change notice to the Contract shall be fully detailed, itemizing all components required to facilitate the change. Supporting documents and estimates shall be available to WGCS upon request.
- ii. The value of all changes shall be agreed in advance by WGCS and the Vendor on a firm price basis.

### **1.11 CONFLICT OF INTEREST**

During the term of this Agreement, the Vendor shall not undertake or engage in any work for another client that could reasonably result in a conflict of interest. Any conflicts that arise or become apparent during the term of the Agreement shall be immediately disclosed to WGCS, in order for WGCS to determine the most appropriate course of action.

Determination of the existence of a conflict of interest shall be the decision of WGCS, acting not unreasonably, and such decision shall be final.

### **1.12 PRIVACY**

#### **1.12.1 Privacy**

The successful Vendor must comply with any applicable privacy legislation and with WGCS' privacy policies and practices.

#### **1.12.2 Unauthorized Access**

The Vendor shall immediately notify WGCS if Confidential Information it handles on WGCS' behalf is stolen, lost, accessed by unauthorized persons or collected, used, or disclosed inappropriately.

### **1.13 FREEDOM OF INFORMATION**

All proposals and associated information submitted to WGCS shall become the property of WGCS, and shall be subject to Freedom of Information legislation.

### **1.14 CONTRACT DOCUMENTS AND ORDER OF PRECEDENCE**

The contract shall consist of the following documents and, in the event of a conflict between them, the order of precedence, notwithstanding the chronological order in which they are issued or executed, shall be as follows:

- i. The executed Agreement/Purchase Order;
- ii. Addenda to the RFP and any subsequent negotiated changes;
- iii. Request for Proposal Document and all attachments; and
- iv. The Vendor's proposal

## **PART 2 – PROJECT DESCRIPTION AND DELIVERABLES**

### **2.1 COMPANY DESCRIPTION**

WGCS is one of the largest social service agencies in Toronto, delivering integrated programs from physical, mental health and disability services to affordable housing and pathways to employment. For 85 years, WGCS has worked with communities to improve health and wellbeing for seniors, single mothers, newcomers and youth, creating new opportunities to thrive.

WGCS is the lead agency for the Toronto West Local Immigration Partnership (TWLIP) which brings together newcomer-serving organizations in order to develop and implement local strategies that coordinate and enhance service delivery to newcomers while promoting innovation and efficient use of resources.

### **2.2 PROJECT BACKGROUND**

WGCS is seeking a consultant to fulfill the key objectives outlined in Section 2.3 with support from the TWLIP Collective Impact Working Group (includes TWLIP staff and TWLIP members) and possibly other TWLIP members and community partners. The selected vendor will design a road map to guide TWLIP efforts at building an effective evaluation framework. The work will build on prior TWLIP undertakings, including:

- the TWLIP Theory of Change
- the survey of newcomer clients to assess their progress towards settlement goals
- the survey conducted with newcomer service providers regarding shared measurements

The vendor will receive support from the TWLIP staff and Collective Impact Working Group who will offer their expertise and connections within the newcomer serving sector, including expertise regarding the issues and challenges faced by newcomers, and prior work evaluating strategies and programs in West Toronto that support newcomer settlement.

The vendor will supplement this knowledge with their own expertise in building evaluation frameworks and managing a project with multiple stakeholders.

## 2.3 SCOPE OF SERVICES AND KEY DELIVERABLES

Key deliverables include:

- **Develop an evaluation framework** outlining how best TWLIP can evaluate its collective work with newcomer service providers and newcomer clients
- **Review and analyze survey results** of newcomer clients and identify areas where newcomer clients are in need of supports according to the survey (areas to be measured)
- **Incorporate the TWLIP Theory of Change** into the framework (i.e. Identify strategies in the ToC to be prioritized and measured)
- **Work with the Collective Impact Working Group and TWLIP staff** to move the project forward, including holding at least monthly meetings to update the Group/staff, seek feedback, and to help build the capacity of the Group/staff around implementing the framework
- **Further develop the existing survey** (mentioned above - 2<sup>nd</sup> bullet point) for incorporation into an ongoing evaluation process
- **Facilitate a presentation** to TWLIP members on the framework
- **Produce a written report** that includes a measurement and evaluation strategy TWLIP can follow to measure its strategies and outcomes in supporting and improving outcomes for newcomer clients

## **PART 3 – EVALUATION PROCESS: SUBMISSION INSTRUCTIONS AND EVALUATION CRITERIA**

Vendors' proposals are to be based solely on the criteria described below and any Amendments/Addenda issued thereto. Vendors are advised to present the requested information clearly and concisely. The information should be relevant and given in context to this particular project with demonstration of a clear understanding of WGCS' requirements. Failure to provide the requested information may result in rejection of the proposal. Evaluations will be based on the criteria identified in the balance of this section.

### **3.1 Evaluation Overview**

WGCS will select at most the top five proposals and will conduct the evaluation of proposals in the manner detailed below.

All scores will be added and, subject to satisfactory reference checks (including discovery and internal references, if any) and the express and implied rights of WGCS, the top candidates will be selected and may be invited for an interview. WGCS reserves the right to adjust scores based on result of the reference checks and interview. The following table summarizes the evaluation process:

| <b>Scoring Component</b> | <b>Weight as % of Combined Rated Score</b> |
|--------------------------|--|
|--------------------------|--|

|   |             |
|---|-------------|
| Vendor Qualifications and/or depth of relevant experience and skills                                    | 30%         |
| Evaluation of completed similar or comparable work  | 20%         |
| Project Schedule (as detailed in Section 3.3.2) – Relevancy, plan to meet deliverables, overall quality | 30%         |
| Pricing   | 20%         |
| <b>Total</b>  | <b>100%</b> |

**3.2 Mandatory Submission Requirements**

Proposals that do not comply with all of the mandatory requirements including incomplete or late submissions, will, subject to the express and implied rights of WGCS, be disqualified and not evaluated further.

All proposals must include:

1. Mandatory Response Submission Form (Appendix A)
2. Pricing Submission Form (Appendix B)
3. Conflict of Interest/ Unfair Advantage Declaration (Appendix C)
4. Reference Form (Appendix D)
5. Project Schedule (as detailed in Section 3.3.2)

With all forms completed and signed by the vendor where applicable.

**3.3 Written Rated Evaluation Criteria**

The Evaluation Team will score each qualified Proposal on the basis of the rated requirements. Vendors are advised to present the requested information clearly and concisely. The information should be relevant and given in context to this particular project proposal. Vendors should also note and provide detail about any part of their proposal that does not meet one or more of the stated requirements.

**3.3.1 Company Overview and Understanding of Requirements**

The Vendor should demonstrate an understanding of the requirements by describing how the Vendor will deliver the services outlined in Section 2 of this RFP. This description should include, but not be limited to, the information in the scoring table.

**3.3.2 Project Schedule**

The Vendor should provide a project schedule demonstrating understanding of WGCS’ timeline. The project schedule should include all activities, milestones, and timelines for the completion of deliverables outlined in Section 2.

It should be noted that the number of workdays and/or hours in the Project Schedule is expected to match with the costing information provided by the Vendor as part of Appendix B.

**3.4 In-person Interview**

An in-person interview may be conducted for the purpose of learning more about a Vendor’s:

- a) relevant work experience including the Vendor providing examples of their work.
- b) unique skills and experience that sets the Vendor apart from its competition.

### 3.5 Pricing Evaluation

Pricing will be scored based on a relative pricing formula using the Total Fees price set out in the Appendix B Pricing Submission Form. The pricing evaluation shall be scored based on a relative pricing formula where each Vendor shall receive a percentage by dividing that Vendor’s total price into the lowest bid total price. Vendors are to include all costs associated with their proposal including a current schedule of rates and the perceived costs of service delivery based on the project plan and team outlined herein. Please refer to Section 3.2 to ensure pricing is compliant to guidelines in the Pricing Submission Form (Appendix B).

#### For Example: Pricing Evaluation (Example Only)

| CALCULATION  |                  |                              |                 |
|--|------------------|------------------------------|-----------------|
| <b>Price Bid Score (Proposal “X”) =</b>  |                  |                              |                 |
| (Lowest Total Price / Total Price for Proposal “X”) x 30, rounded to the 4 <sup>th</sup> decimal place |                  |                              |                 |
| <b>Example Calculation</b>   |                  |                              |                 |
| Two (2) Proposals are being considered with the following total prices: P1: \$1,000 P2: \$2,000        |                  |                              |                 |
| The lowest Total Fees Price for the two (2) Proposals is \$1,000 (i.e., P1)                            |                  |                              |                 |
| The points awarded to each Proposal would be calculated in the manner set out below:                   |                  |                              |                 |
| Proposal   | Total Fees Price | Calculation                  | Price Bid Score |
| P1   | \$1000           | 1000/1000) x 30,<br>rounded  | 30              |
| P2   | \$2000           | (1000/2000) x 30,<br>rounded | 15              |

### 3.6 Tie-Breaker

Upon completion of the pricing evaluation, the score from the pricing stage will be added to the scores for the other criteria for each qualified Vendor. The resultant highest total scoring qualified Vendor will be selected as the successful Vendor.

In the event that there is a tie in the final scores, the Vendor with the highest score in the evaluation criteria will be selected as the successful Vendor, in the following order:

1. Evaluation of completed similar work and previous customer satisfaction
2. Vendor Team Qualifications
3. Unique skills and/or experience that sets Vendors apart from competition
4. Price

### 3.7 References

WGCS reserves the right to contact any or all project references indicated in the Vendor’s submission and to use this information in the evaluation and scoring of submissions.

### 3.8 SUBMISSION INSTRUCTIONS

Proposals must be submitted by **either** of the following methods:

(a) Email: The Vendor must submit one (1) signed proposal by an authorized representative in either Microsoft Word or PDF format to the RFP Contact. Appendix B should be completed and submitted as a **separate attachment**.

**RFP Contact:**

WoodGreen Community Services

[admin@torontowestlip.ca](mailto:admin@torontowestlip.ca)

(b) E-tendering Websites: The Vendor must submit one (1) signed proposal by an authorized representative in PDF format (unlocked, no passwords installed) to the public e-tendering website where this RFP was posted. As per the e-tendering website and the requirements of this RFP, Appendix B should be completed and submitted as a separate attachment.

**APPENDIX A**  
**RESPONSE SUBMISSION FORM (1 of 2 pages)**  
 (To be submitted on vendor letterhead with the proposal)

**Vendor Information:**

Please fill out the following form, and name one person to be the contact for this RFP response.

|   |  |
|---|--|
| Full Legal Name of Vendor:  |  |
| Any Other Relevant Name Under Which the Vendor Carries on Business: |  |
| Street Address:   |  |
| City, Province/State:   |  |
| Postal Code:  |  |
| Phone Number:   |  |
| Company Website (If Any):   |  |
| RFP Contact Person and Title:                                       |  |
| RFP Contact Phone:  |  |
| RFP Contact E-mail:   |  |

I/We the undersigned, having carefully examined, understood and agreed with the Procurement documents, specifications, and terms and conditions attached to and forming part of the Proposal, hereby accept without change or reservation and agree to be bound by said Proposal for WGCS “RFP” and all other works pertinent thereto.

I/We DECLARE that:

1. no person, other than the one whose signature or the signature of proper officers and seal is or are attached has any interest in this bid response or in the proposed contract;
2. the individuals executing this document on behalf of the Vendor are duly authorized signing officers capable of binding the Vendor;
3. this proposal is made without any connection, knowledge, comparison of figures or arrangements with any other person making a response for the same work and is in all respects fair and without collusion or fraud;
4. no attempt has been made, nor will be made, to induce any other person to submit, or not to submit, a proposal, for the purposes of restricting competition;
5. the prices in this proposal have not been knowingly disclosed by the Vendor, and will not knowingly be disclosed by the Vendor prior to award, directly or indirectly, to any other Vendor or competitor;
6. no member of the existing Board or Officer of WGCS, or any proposed member or Officer of WGCS is, or will become interested directly or indirectly in the performance of the contract, or in matters to which it relates, or of any supplies to be used therein, or in any of the monies to be derived therefrom;

7. the matters stated in this response are in all respects true;

8. I/We AGREE that this offer is to remain open for acceptance until the formal contract is executed by the successful Vendor for the said deliverables or for a minimum period of sixty (60) days, whichever event first occurs and that WGCS may at any time within that period, without notice, accept this bid response whether or not any other proposal has been previously accepted;

9. I/We AGREE to any reasonable extension of the sixty (60) days offer validity period should an extension become necessary;

10. I/We AGREE to supply all goods and services in accordance with all Terms and Conditions and Specifications as provided in this procurement document; and

11. I/We AGREE to negotiate with WGCS any change in sums payable as included in the Appendix B - Pricing Form, resulting from any additions and/or deletions

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Signature of Witness

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Signature of Vendor Representative

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Name of Witness

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Name and Title of Vendor Representative

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Date:

**APPENDIX B  
PRICING FORM**

Vendors shall submit a separate copy (attachment) of their Pricing Form Proposal for the required Deliverables. The Pricing Form shall be clearly marked as Appendix B – Pricing Form.

As outlined in this RFP, Vendors must include the overall cost, and a breakdown of the per diem rate for different team members, to meet the required deliverables and should provide a clear outline of costs (e.g., an itemized list) of their proposal.

Pricing must include all expenses, disbursements, payment terms and Harmonized Sales Tax (HST).

**APPENDIX C**  
**CONFLICT OF INTEREST/UNFAIR ADVANTAGE DECLARATION**  
**(To be submitted on vendor letterhead with the proposal)**

In order to be considered for a contract award, Vendors must submit the following statement and information regarding conflict of interest:

I/We hereby certify that the preparation and submission of this response to RFP (WGCS-09-2022-TWLIP-001) by \_\_\_\_\_ (Vendor company name), its employees, agents and advisors was done in the absence of any conflict of interest or unfair advantage of those so involved.

I/We further confirm that \_\_\_\_\_ (Vendor company name) has not knowingly hired or retained the services of any employee or former employee of WGCS, where in doing so such employee or former employee is in breach of a Conflict of Interest Policy or separation agreement.

Dated at this day of \_\_\_\_\_, 2022.

\_\_\_\_\_  
(Signed – Original Signature)

\_\_\_\_\_  
(Authorized Signing Officer Name - Print)

**APPENDIX D – REFERENCES**

| <b>CLIENT REFERENCES</b>   |
|--|
| Please provide details of <b>two (2) references</b> to whom you have provided similar services within the past five (5) years, and provide as much of the following information as possible for each client. |
| <b>Reference 1:</b>  |
| Client's name  |
| Client's address   |
| Client Contact name  |
| Contact's title/function   |
| Contact's telephone number   |
| Contact's email  |
| Type of service / project implemented  |
| Brief description of project (must have been completed within previous five (5) years):  |
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| <b>Reference 2:</b>  |
| Client's name  |
| Client's address   |
| Client Contact name  |
| Contact's title/function   |
| Contact's telephone number   |
| Contact's email  |
| Type of service / project implemented  |
| Brief description of project (must have been completed within previous five (5) years):  |
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