



PINK TRIANGLE SERVICES (PTS)

The Wellness Project

Request for Proposal (RFP)

Research, workshops, survey design, data gathering/compilation,
report and handbook production.

June 1, 2000



SUMMARY

OVERVIEW: The Wellness Project is an initiative of the Ottawa-Carleton Gay, Lesbian, Bisexual, Transgender (GLBT) Health Task Group, sponsored by Pink Triangle Services (PTS), funded by the Ontario Trillium Foundation and the Region of Ottawa-Carleton (ROC). A copy of the funding proposal as well as a detailed organizational structure of the Wellness Project can be found on our web site. Critical information for the potential bidders, such as the entire Request for Proposal document, the Project Management plan and contractual clauses, can also be found at the same location.

An important element of this work will be working closely with GLBT volunteer community groups that will assist with the implementation of the Project.

The Wellness Project is a community-based survey to: determine the wellness needs of GLBT residents and their families of Ottawa-Carleton, document existing wellness resources available in the region and recommend strategies for actions which will enhance the health and well-being of local GLBT residents and their families.

ACTIVITIES AND DELIVERABLES: The two main deliverables at the conclusion of the project are:

- A final report including the results of the literature review, the data collection (workshops, focus groups and survey) and analysis outlining the gaps discovered in the needs assessment with recommendations for a strategic action plan; and
- A GLBT wellness guide-resource handbook, promoting healthy living and cataloguing the health and wellness resources available to residents of the Ottawa-Carleton Region.

TIMELINES: From July 7, 2000 to May 15, 2001 (refer to the Project Management Plan on the Project Web site -- <http://www.pinktriangle.org/wellness>).

BUDGET: Funds available for this RFP are up to \$50,000.00.

CLOSING DATE: This solicitation closes on June 23, 2:00 p.m. EST.

REQUESTS FOR INFORMATION: To ensure fairness and transparency ALL questions related to the Wellness Project and this RFP should be directed to: Carmen Paquette (e-mail: egale_cp@istar.ca FAX: (613) 741-1557; Tel: (613) 741-1059).

Pink Triangle Services (PTS) – The Wellness Project reserves the right to not award a contract as a result of this solicitation.

WEB SITE: www.pinktriangle.org/wellness



PART I – STATEMENT OF WORK - PERIOD OF CONTRACT - INFORMATION AND INSTRUCTIONS

Section I - Statement of Work

The contractor shall deliver the following as per the agreed upon work plan (Deliverable 1), which should be developed according to the Project Management Plan available on the Wellness Project web site and as per the project objectives described in Section 2d and 2e of the funding proposal:

- Develop a detailed work plan in accordance with the guidelines and deadlines provided by The Management Team of the Wellness Project (Deliverable 1)
- Carry out literature search and review all pertinent materials provided by The Wellness Project Management Team and consult with The Management Team of the Wellness Project to clarify the needs, objectives, focus and degree of technical complexity of the survey instrument(s). Synthesize current state of knowledge of health and wellness needs of GLBT community.
- Using acquired knowledge, develop draft survey instrument(s) for the needs assessment part of the project and appropriate instrument(s) for the resource inventory part of the project (refer to Main Deliverables p.2). (Deliverable 2) For the instrument(s): research and provide examples of measures commonly used in surveys for measuring various socio-economic concepts (more than one measure should be given for one concept to highlight pros and cons).
- Prepare the agenda and conduct the initial Workshop (in English and French) to validate the literature findings, present the draft instrument(s) reflecting the needs of the Ottawa-Carleton GLBT community; prepare workshop report (Deliverable 3).
- Integrate comments and concerns of participants in workshop and subsequent focus groups (bilingual, if such methodology is used) and produce final design of the survey instrument(s) (Deliverable 4).
- Ensure the proper distribution and gathering of survey (to be done jointly with volunteers of the project).
- Compile and analyse data and prepare a written interim report outlining: results of literature review, survey data analysis (gaps identification), results of resource inventory and initial strategy outline and recommendations (Deliverable 5).
- Prepare and conduct final workshop (in English and French) to discuss findings, proposed recommendations and strategic directions (Deliverable 6)
- Prepare interim Final Report and draft Wellness Guide - Resource Handbook to be presented to The Wellness Project Management Committee (Deliverable 7)
- Design and Prepare final report in English in Print-ready format in Microsoft Word 6.0 (Deliverable 8) Main Deliverable p.2.
Note: Translation of documents will be the responsibility of the Wellness Project Management Team.
- Design and Prepare Wellness Guide – Resource Handbook in English in Print-ready format in Microsoft Word 6.0 (Deliverable 9) Main Deliverable p.2.
Note: Translation of documents will be the responsibility of the Wellness Project Management Team.



Section II - Period of Contract

The period of any resulting contract shall be from date of contract award (on or around July 7, 2000) to May 15, 2001.

Section III - Information and Instructions

Submission of Proposals:

Bidders shall prepare a proposal addressing all the requirements of this RFP. The proposal must include a completed version of the page of this RFP entitled "Vendor Legal Name and Address".

Number of copies of Bid Required: Three (3) copies

Closing Period

The closing period for the RFP is June 23, 2000. Bids should be enclosed in two parts in two separately sealed envelopes. Envelope 1 shall contain the technical elements of the proposal and envelope 2 shall contain the financial elements of the proposal.

All bids should be mailed to:

BID-The Wellness Project
Pink Triangle Services
P. O. Box 3043, Station D
Ottawa, ON
K1P 6H6

Enquiries:

Address all enquiries ONLY to Carmen Paquette, the Wellness Project Management Committee representative, (non-compliance with this condition, during the bid solicitation period, may (for that reason alone) result in disqualification of your bid):

Carmen Paquette
E-mail: egale_cp@istar.ca
Facsimile: (613) 741-1557
Telephone: (613) 741-1059

All enquiries regarding the bid solicitation must be submitted in writing (e-mail preferred) to Carmen Paquette, Wellness Project Management Committee representative, as early as possible within the bidding period. Enquiries must be received no less than 48 hours prior to the bid closing date to allow sufficient time to provide a response. Enquiries received after that time may not be able to be answered prior to the bid closing date.



To ensure Bidders are provided information in a consistent and transparent manner, the Wellness Project Management representative will provide, simultaneously to all companies through the Wellness Project web site (www.pinktriangle.org/wellness), any information with respect to significant enquiries received and the replies to such enquiries without revealing the source. All potential bidders are strongly encouraged to periodically visit the Wellness Project Web site to gather up-to-date information about the project.

Should the number of enquiries so justify, the Wellness Project Management Representative may choose to conduct a bidder's conference at a location and time convenient to Representative(s) of the Wellness Project Management Team.

Part II – SUBMISSION OF PROPOSAL – WORK LOCATION AND CONTRACTING AUTHORITY – BID EVALUATION

Section I – Submission of Proposal

Statement of Work:

The proposal will address each requirement as described in the Statement of Work (Part I, Section I), in keeping with the Project Management Plan [See the Wellness Project Web site (www.pinktriangle.org/wellness)].

Curriculum Vitae and Interviews:

The proposal will include a curriculum vitae of each member of the consultant team and two relevant references.

Representatives of Pink Triangle Services and/or The Wellness Project may interview prospective Contractors as part of the evaluation process, at their own expense.

Price Proposal:

The Bidder shall provide a firm, all-inclusive price to carry out the Work detailed in the Statement of Work and its proposal, GST extra if applicable. The Bidder is required to provide, in the financial envelope, a complete breakdown of the firm price by category of personnel and all direct, indirect and overhead costs.

Proposal Evaluation and Contractor Selection Criteria:

All bids received will be evaluated, and the successful Bidder selected, in accordance with the criteria detailed below in Section III.

It is essential that the elements contained in your bid be stated in a clear and concise manner. Failure to provide complete information as requested will be to your disadvantage.

Bids should be submitted in the format requested. The Contracting Authority reserves the right to accept any bid as submitted without prior negotiations. It is the responsibility of the Bidder to obtain clarification of the requirements contained herein, if necessary, prior to submitting its bid.



Section II - Work Location and Contracting Authority

Work Location:

Normally, the Work shall be performed at the Contractor's own place of business. However, provision will be made for the Contractor's personnel, on a need-to-know basis, to have access to sensitive (designated/classified) information or assets as required. The Project Authority will provide facilities as necessary. Technical and clerical support, supplies and equipment necessary to accomplish tasks are to be provided by the Contractor. Facilities for the conduct of workshops/focus groups will be provided by Pink Triangle Services – The Wellness Project.

Contracting Authority:

The Contracting Authority for this requirement is:

Barry Deeprise – The Wellness Project
Pink Triangle Services (PTS)
P. O. Box 3043, Station "D"
Ottawa, Ontario
K1P 6H6



Section III – Evaluation of Offer and Contractor Selection Methodology

Process:

The evaluation of each offer shall be carried out in three stages as follows:

Stage 1: Mandatory Requirements

It is understood by the parties submitting offers that, to qualify, bidders must meet all the Mandatory Requirements of this Request for Proposal.

Offers not meeting any or all of the Mandatory Requirements will be given no further consideration.

Stage 2: Rated Requirements

Stage 3: Costing Proposal

Only those offers which meet a minimum total score of *75 percent* overall for the rated requirements used in the point rating will be considered for the final stage, the costing evaluation.

Neither the valid offer that scores the highest number of rating points, nor the one that contains the lowest firm price will necessarily be recommended for contract award. The selection of the Contractor will be made on the basis of the best overall value to PTS in terms of technical merit and cost, which will be determined by dividing the proposed cost by the total technical score so as to establish the lowest cost per point.



Requirements:

Mandatory Requirements	Y/N
<ul style="list-style-type: none"> Bidders must provide current resumes of consultant(s) who will be involved in the project and a description of their role 	
<ul style="list-style-type: none"> Proposed consultant(s) must have demonstrated expertise and experience in survey design methodology and in the field of evaluation research, particularly in the area of socio-economic programs and/or wellness programs. 	
<ul style="list-style-type: none"> Bidders must provide a deliverable timeline, including level of effort per resource. 	
<ul style="list-style-type: none"> All required documentation and signed documents and forms forming part of this request for proposal must be included in the bidder's package. 	
Pass/Fail	P or F
Rated Criteria	
<p>Approach and Methodology In this section of the proposal, the bidder must provide sufficient detail to allow for a complete and full understanding oh how tasks/activities will be carried out to meet all requirements of the statement of work detailed in Section I, Part I of this RFP. Specifically, the following elements are to be addressed:</p>	
<ul style="list-style-type: none"> Demonstrated understanding of the project objectives and key activities 	/10
<ul style="list-style-type: none"> Demonstrated understanding of The Wellness Project's needs in terms of survey design, information and techniques 	/10
<ul style="list-style-type: none"> Demonstrated understanding of the communities to be surveyed 	/10
<ul style="list-style-type: none"> Adequacy of proposed approach, including resource effort and schedule 	/30
<ul style="list-style-type: none"> Recognition of issues involved in the development of the survey tool(s), and of the production of the two main deliverables, including the aspect of multiculturalism. 	/10
Sub-Total	/70
<p>Proposed Expertise</p>	
<ul style="list-style-type: none"> Demonstrated relevant expertise and experience of proposed consultant(s) in survey design, methodology, sampling techniques and final data compilation and analysis 	/25
<ul style="list-style-type: none"> Demonstrated expertise and experience of proposed consultant(s) in the development and conduct of workshops and focus groups 	/25
Sub-Total	/50
Grand Total	/120



“Vendor Legal Name and Address”

Vendor Legal Name and Address:	
Contact Name:	
Telephone No.:	Fax No.:

Name and Title of Person authorized to sign on behalf of Bidder	
Name:	
Title:	
Signature:	Date:

Your proposal must contain a completed version of this page as well as a signed copy of all certifications found in the contractual clauses.

PROPOSAL TO: Pink Triangle Services - The Wellness Project

By submission of this proposal, I have read and agree with the contractual clauses on the Wellness Project Web site: www.pinktriangle.org/wellness

Signature