



## Contract 5066P

### Consulting Services for the Older Adults Service Plan Update

#### 1. Introduction

- 1.1 Staff of the City of Richmond (the “City”) is undertaking an update of the current Older Adults Service Plan (Service Plan), which was adopted by Richmond City Council in May 2008. This update will represent the first revision to this important policy document since its adoption and implementation. The Service Plan can be viewed online at the following link: [http://www.richmond.ca/\\_\\_shared/assets/Older\\_Adults20415.pdf](http://www.richmond.ca/__shared/assets/Older_Adults20415.pdf)
- 1.2 The City proposes to engage the services of a Consultant to work collaboratively with City staff to undertake a comprehensive update to the City’s current Older Adults Service Plan.
- 1.3 The objective of this Request for Proposal (“RFP”) is to provide the City with qualified Proponents capable of carrying out the work herein defined. The subsequent Proponent submissions will form the basis for evaluation, interview and selection.

#### 2. Definitions

- 2.1 Throughout this RFP the following definitions apply:
  - a) “BC Bid” means the electronic tendering service maintained by the Province of British Columbia located online at [www.bcbid.ca](http://www.bcbid.ca), or any replacement website;
  - b) “City” means the City of Richmond, British Columbia;
  - c) “Contract” means the written agreement resulting from this Request for Proposal executed by the City and the Vendor for the Work;
  - d) “Lead Proponent” is the Proponent whose Proposal, as determined through the evaluation criteria described in this RFP, provides the

best overall value in meeting the requirements of the RFP, and with whom a Contract will be considered;

- e) “Proposal” means a proposal submitted by a Proponent in response to this Request For Proposal;
- f) “Proponent” means an individual or a company that submits, or intends to submit, a Proposal in response to this Request for Proposal;
- g) “RFP” or “Request for Proposals” means this request for proposals, inclusive of all appendices and any addenda that may be issued by the Owner;
- h) “Submission” means a proposal submitted by a Proponent in response to this RFP;
- i) “Successful Proponent” means the same as “Vendor”
- j) “Vendor” means the Successful Proponent to this Request for Proposal who enters into a written Contract with the City to perform and to oversee the Work and
- k) “Work” means the provision of all labour, services, material and equipment, and any action as necessary for the Preferred Proponent to complete and perform its obligations in accordance with the terms and conditions of the Contract.

### 3. Submission Details

- 3.1 5 (five) hard copies and 1 (one) electronic copy (on a CD ROM or memory stick) of Proposals marked “**Contract 5066P- Consulting Services for the Older Adults Service Plan Update**” addressed to the Purchasing Section, will be received at the Information Counter, Main Floor, Richmond City Hall, 6911 No. 3 Road, Richmond BC V6Y 2C1, **until 12:00 noon., local time on Monday, February 03, 2014.** Submissions received after this time may be returned to the sender unopened.

### 4. Enquiries

- 4.1 Clarification of terms and conditions of the proposal process shall be directed to:

Purchasing  
Sharon Bentley, Buyer 2      E-mail: [purchasing@richmond.ca](mailto:purchasing@richmond.ca)  
Purchasing Section  
City of Richmond

- 4.2 The City, its agents and employees shall not be responsible for any information given by way of oral or verbal communication.
- 4.3 The City will only respond to questions that are submitted in writing. Any questions that are received and answered by City Staff that affect the Proposal Process, any interpretation of, additions to, deletions from, or any other corrections to the RFP document, may be issued as written addenda by the City. It is the sole responsibility of the potential Proponents to check with the following websites to ensure that all available information has been received prior to submitting a proposal:
- a) City of Richmond: <http://www.richmond.ca/busdev/tenders.htm>
  - b) BC Bid:  
<http://www.bcbid.gov.bc.ca/open.dll/welcome?language=En>
  - c) The decision to issue or not issue an addendum is entirely at the sole discretion of the City.
  - d) The deadline for inquiries is 3pm, local time on Monday, January 27, 2014. The City reserves the right not to respond to inquiries received after this deadline.

## **5. Terms of this RFP**

- 5.1 Proposals shall be open for acceptance for 60 (sixty) days after the closing time whether or not any Proposal has been accepted.
- 5.2 The City reserves the right to cancel this RFP for any reason without any liability to any proponent or to waive irregularities at its own discretion.
- 5.3 Proposals may be withdrawn by written notice only provided such notice is received at the office of the City's Purchasing Section prior to the date/time set as the closing time for receiving proposals.
- 5.4 Except as expressly and specifically permitted in these instructions, no Proponent shall have any claim for any compensation of any kind whatsoever, as a result of participating in the RFP, and by submitting a proposal each proponent shall be deemed to have agreed that it has no claim.
- 5.5 Proponents are advised that the City will not necessarily accept any Proposal and the City reserves the right to reject any or all Proposals at

any time without further explanation or to accept any Proposal considered advantageous to the City.

- 5.6 A Proposal which contains an error, omission, or misstatement, which contains qualifying conditions, which does not fully address all the requirements of this RFP, or which otherwise fails to conform to the requirements in this RFP may be rejected in whole or in part by the City at its sole discretion.
- 5.7 The City may waive any non-compliance with the RFP, specifications, or any conditions including the timing of delivery of anything required by the RFP and may, at its sole discretion, elect to retain for consideration Proposals which are non-conforming, which do not contain the content or form required by the RFP or because they have not complied with the process for submission set out herein.
- 5.8 The City may choose, at its sole discretion, to proceed with all of the components of the Work, none of the components or selected components of the Work.
- 5.9 All Proposals will remain confidential, subject to the *Freedom of Information and Protection of Privacy Act* of British Columbia.

## **6. Negotiations**

- 6.1 The award of the contract is subject to negotiations with the Lead Proponent. Such negotiations include, but are not limited to, the following:
  - a) changes or work refinements in the service requirements or scope of work proposed by the Lead Proponent;
  - b) price – if directly related to a change or refinement in the proposed scope of work proposed by the Lead Proponent and
  - c) specific contract details as deemed reasonable for negotiation by the City.
- 6.2 If a written contract cannot be negotiated within 60 (sixty) days of notification to the Lead Proponent, the City may, at its discretion at any time thereafter, terminate negotiations with the Lead Proponent and either enter into negotiations with the next qualified Proponent or cancel the RFP process at any time.

## **7. Project Background**

- 7.1 Richmond City Council identified a series of Goals and Priorities for the term of 2011 – 2014. One of those goals noted the importance of updating

the Older Adults Service Plan to address the growing needs of older adults in the community including services and facilities for active older adults.

- 7.2 The City’s Older Adults Service Plan has a vision for Richmond “to be a community where older adults live healthily and actively in a cooperative, welcoming and inclusive environment, which promotes engagement, encourages lifelong learning, and values the contribution of older adults.” The Service Plan aims to ensure that effective, meaningful and appropriate Community Services programs and opportunities are provided for older adults in Richmond.
- 7.3 Preparation of the existing Service Plan involved an extensive consultation and research process to ensure program and service alignment with strategic areas of need, as such it is still a highly relevant document. However as the timeframe of the Service Plan was 2008-2012, and Council has identified the need for an updated Service Plan, undertaking an exercise involving validating and/or “refreshing” the existing Service Plan is essential.
- 7.4 An updated Older Adult Service Plan will set the strategic direction, objectives and actions for planning and development of older adults’ services in Richmond for the next five years. To help frame future decisions on services for older adults, it is fundamental that the Service Plan update be grounded within the context of Richmond’s current reality, which includes:
- the current organizational strategic framework of the City (including but not limited to an overview of relevant restructuring that has occurred at an organizational level at the City and consideration of the development and implementation of strategies and plans by the City since 2008 that will influence the update to the Service Plan)
  - key socio-demographic characteristics and trends for Richmond and the implications for both the Older Adult Service Plan update and the health and wellness of the city’s older adults
  - literature review and environmental scan of current best practices and theoretical literature from the research field as well as from other jurisdictions
  - summary of achievements that have been realized through implementation of the current plan
  - It is expected that the process of updating the Service Plan will occur over the period of January 2014 – August 2014.

## 8. Scope of Services and Consultant Duties

8.1 Working in collaboration with, or under the direction of, City staff the Consultant will be responsible for acting on the following tasks in undertaking the update to the Service Plan and producing an Updated Final Older Adults Service Plan:

- a) Compile and summarize findings into a Foundational/Context Setting Report based on:
  - review of City strategic policies and documents
  - review of characteristics, demographic profiles, social and emerging trends of local population
  - assessment of achievements realized in the past 5 years from the implementation of the current Service Plan, which should include, but not be limited to evaluative data compiled by the City. The scope and span of the evaluative effort is to be defined in collaboration with City staff.
  - review of secondary data including administrative level program and service data to include, but not be limited to, a snap shot of current program and service inventory.
- b) Compile learnings and best practices gleaned from the field in a Literature/Jurisdictional Review Report based on an environmental scan and review of:
  - current academic and grey literature from the field to compile best practices. The scope and focus of the review is to be framed in collaboration with City staff.
  - similar strategies developed and implemented by other jurisdictions in BC and across Canada. The selection of jurisdictions is to be undertaken in collaboration with City staff. It is anticipated that at a minimum 4-6 jurisdictions will be included.
- c) Develop a Communications Plan in consultation with the City Staff that will add value to the community and key stakeholder engagement process. The focus may include, but not be limited to, awareness and promotional function and consideration of additional ways for the community and stakeholders to provide their input and feedback.
- d) Develop design instruments for primary data collection, including but not limited to:
  - Key informant interview guide and/or survey(s)
  - Interview guide for cross- jurisdictional scan
  - Focus group facilitation guide(s)
  - Stakeholder consultation guide(s)

- Client/User survey
- e) Develop, in collaboration with the Project Team, advertisements and promotional materials as required for surveys, focus groups, and/or consultations.
  - f) Assist, or lead with the undertaking of primary data collection. Degree of Consultant involvement will be determined in consultation with the Project Team.
  - g) Develop a Primary Data Collection Summary Report based on the aggregation, analysis and summary of findings from primary data collected.
  - h) Prepare a first Draft Updated Older Adults Service Plan based on careful analysis and synthesis of a, b, e noted above.
  - i) Prepare a Final Draft Updated Older Adults Service Plan taking into account Project Team and City staff feedback to the first draft update to the Service Plan and in collaboration with the Project Team work with the City's Production Team to create a final product incorporating desktop publishing, graphic design, and Richmond older adults events photos.

8.2 Specific roles of the Consultant in the project and City expectations for the Consultant include:

- a) A Project Team comprising of City staff has been struck. The Consultant will be required to work in collaboration with and/or under the direction of the Project Team.
- b) At project initiation, the Consultant will be required to engage in an orientation start-up meeting at which time the City will offer its feedback and thoughts on the Consultant's proposed approach to the project. Work on the project is to begin once there is agreement on the approach.
- c) Maintain ongoing and regular communication with the Project Manager.
- d) A Steering committee consisting of City staff as well as key stakeholders whose work has an impact on older adults in the City will be established for this project. The Consultant will be expected to meet with and consider feedback and input from the Steering Committee at specific points in the project.
- e) Meet with Project Team and other City staff as required.

- f) Prepare progress reports on a bi-weekly basis.
- g) Validate approach and work progress with Project Team.
- h) Lead or assist with the primary data collection.
- i) Reflect on and consider issues and directions identified through research, consultation with City staff and the community engagement process and translate information into the writing of the updating Service Plan.

**9. Deliverables:**

9.1 The final deliverable of the consultancy will be a Final Draft Updated Older Adults Service Plan. As intermediary steps, the Consultant will be expected to provide the City with the following deliverables:

- a) Foundation/Context Setting Report
- b) Literature/Jurisdictional Review Report
- c) Communications Plan
- d) Data Collection Instruments including, but not limited to:
  - Key informant interview guide/and or survey(s)
  - Interview guide for cross- jurisdictional scan
  - Focus group facilitation guide(s)
  - Stakeholder consultation guide(s)
- e) Primary Data Collection Summary Report
- f) First Draft Updated Older Adults Service Plan
- g) Final Draft Updated Older Adults Service Plan
- h) PowerPoint Presentation based on Final Draft Updated Older Adults Service Plan
- i) Meetings with Project Team, as required, during critical stages of the project.

Final deliverable will be a Final Updated Older Adults Service Plan, which should be succinct and fully edited and address all of the key elements outlined in Section 8 above. In addition, work in collaboration with the Project Team and the City's Production Team to create a final product incorporating desktop publishing and graphic design.

## **10. City Provided Items**

10.1 The Community Services Department will manage this project and will provide the consultants with:

- a) All language translations for public engagement if deemed appropriate;
- b) Identification of City staff and external parties for interviews, meetings, focus groups, and consultations;
- c) Booking of meeting spaces;
- d) Access to pertinent City reports, documents, strategies, plans and initiatives;
- e) Hard copies of documents that are not digitally available;
- f) Hotlinks to relevant plans and documentation on City website;
- g) Access to community stakeholders for engagement process and
- h) Access to Steering Committee.
- i) Access to City Production Team for desktop publishing and graphic design.
- j) What are we to provide - reports, equipment, working space, staff time, support staff, word processing etc.
- k) Budget-The project budget is \$40,000 Canadian funds, including all applicable taxes. This is the full upset limit for the scope of the work under this RFP, including a final report and all associated costs.

## **11. Project Schedule**

The project is to be completed by August 31<sup>st</sup> 2014, with work commencing as soon as possible. A project schedule is to be submitted with the proposal.

Dates are for planning purposes only and are subject to change based upon circumstances.

## **12. Proposal Submissions**

All proponents are required to provide the following information with their submissions, and in the order that follows:

SECTION A: Cover Letter and Executive Summary

- a) This covering letter referencing the RFP number and title should clearly state the Proponent's understanding of the services to be provided. A description of the consultant's understanding of the project objectives/outcomes and vision, and how these will be achieved.
- b) The executive summary should provide a synopsis of proposed overall approach and key points in your Proposal.

#### SECTION B: Table of Contents

- a) The Table of Contents should reference the applicable section, subsection and page numbers (e.g. Section C pages x-x, Sub-Section Part 1 page x-x). Pages should be consecutively numbered.

#### SECTION C: Organizational Capacity and Profile

- a) Provide sufficient information about your company that includes, but is not limited to the following:
  - i. Contact information, including name, title, address, e-mail, telephone number and facsimile numbers.
  - ii. Any other name(s) Proponent is, or has, been doing business under.
  - iii. A Corporate profile of their firm outlining its history, philosophy and target market.
  - iv. Detailed information of the Proponent's years of relevant experience in providing the services required by this RFP.

#### SECTION D: Team Composition, Competency, Experience and Samples of Work

- a) Provide sufficient information that demonstrates the Proponent's experience, qualifications, capacity, and availability of resources including the ability to meet Requirements of this RFP.

##### Part 1: Team Composition, Competency, and Experience

- i. A complete listing of all key personnel who will be assigned to this project.
- ii. A brief resume identifying each individual team member's qualifications, skill set, and experience demonstrating comparability to the work required for this project. Preference will be given to Proponents demonstrating

knowledge of and experience in the field of gerontology and ageing, and those who have worked on projects with municipal government.

- iii. A resource plan (in table format) detailing the degree of team member's roles, level of effort and commitment demonstrating a match with the resources needed for the work of this project.

#### Part 2: Samples of Work

- a) Provide sufficient information that demonstrates the Proponent's competencies, ability, experience, track record, and references of current and former clients for types of services described in this RFP.
  - i. A brief summary of 5 recent (within the past 5 years) projects similar in size and scope to this project demonstrating ability, and experience to undertake the work for this project as described in Section 8 of this RFP. Ideally, at least one of the summaries will include a project which focussed on the older adult population, gerontology and/or ageing, and those prepared on behalf of a municipal government. Please provide a name and contact number for a reference for each of the examples provided.

#### SECTION E: PROPOSED PROJECT METHODOLOGY, SCHEDULE, PRICE

- a) In this section Proponents should provide a detailed proposal of what will be delivered, including the expected outcome and benefits to the City.
  - i. A detailed project methodology for the implementation of the scope of services, duties and deliverables detailed in Sections 8 and 9 of this RFP. Explain each project task including what will be expected of both the consultant and the City with respect to each task.
  - ii. A detailed schedule of all activities, tasks, deliverables, project meetings, and progress reports required for this project.
  - iii. Provision of a priced methodology complete with a time allotment for each identified task proposed to employ to carry out the work, this shall form the basis for payments to the successful proponent. Supplement this with a schedule of fees for staff to be assigned to the project. These rates

shall be the basis for adjustments to the value of the contract in the event the scope of work varies from that proposed.

### **13. Review of Proposals**

- 13.1 The City will review the Proposals submitted to determine whether, in the City's opinion, Proponents have demonstrated the required experience and qualifications to fulfill the obligations of the services identified in this RFP.
- 13.2 The City, in its sole discretion and without having any duty or obligation to do so, may conduct any inquiries or investigations, including but not limited to contacting references, to verify the statements, documents, and information submitted in connection with the Proposal and may seek clarification from the Proponent's clients regarding any financial and experience issues.
- 13.3 Proposals shall be evaluated to determine the best value offered to the City against conformance to the following criteria:
  - a) Organizational Capacity and Profile.
  - b) Team Composition, Competency, Experience, Samples of Work.
  - c) Understanding of project objectives/Outcomes and vision.
  - d) Project Methodology.
  - e) Effectiveness of work plan and schedule.
  - f) Project Deliverables.
  - g) Value for Money.
  - h) References.
- 13.4 Proponents may be scheduled for an interview at the discretion of the City.

### **14. Non-Conforming Proposals**

- 14.1 Proposals which fail to conform to the Format Requirements or which fail to conform to any other requirement of this RFP may be rejected by the City. Notwithstanding the foregoing or any other provision of this RFP, the City may at its sole discretion elect to retain for consideration Proposals which deviate either materially from the format requirements set out in hereto or which otherwise fail to conform to any other requirement of this RFP except the requirement of delivery of the Proposal prior to Closing Time.

**15. RFP Process**

15.1 The City may unilaterally take the following actions, and shall not be liable for any such actions:

- a) amend the scope and description of the products and services to be procured as described in this RFP, and the qualifications that may be required to meet those requirements;
- b) reject or accept any or all Submissions;
- c) cancel the RFP process at any time and reject all submissions; or
- d) cancel the RFP process and recommence in respect of the same RFP with the same or an amended set of documents, information and requirements.

15.2 The Proponent acknowledges and agrees that any RFP is in no way whatsoever an offer to enter into an agreement and submission of a RFP by any Proponent does not in any way whatsoever create a binding agreement. The Proponent acknowledges that the City has no contractual obligations whatsoever arising out of the RFP process.

**16. Working Agreement**

16.1 The successful proponent will enter into a contract for services with the City based upon the information contained in this RFP and the successful proponent's submission and any modifications thereto.

16.2 Proponents may include their standard terms of engagement with the Proposals.

**17. Information Disclaimer**

17.1 The City and its directors, officers, employees, agents, consultants and advisors are not liable or responsible for any verbal or written information, or any advice, or any errors or omissions, which may be contained in this RFP or otherwise provided to any Proponent pursuant to this RFP.

17.2 The Proponent shall conduct its own independent investigations and interpretations and shall not rely on the City with respect to information, advice, or documentation provided by the City. The information contained in this RFP is provisional and will be superseded by other agreement documents.

17.3 The City makes no representation, warranty, or undertaking of with respect to this RFP and the City and its directors, officers, employees, agents, consultants and advisors, shall not be liable or responsible for the accuracy or completeness of the information in this RFP or any other

written or oral information made available to any interested person or its advisors, and any liability however arising, is expressly disclaimed by the City.