



The Children's Aid Society
OF HAMILTON

La Société d'aide à l'enfance
DE HAMILTON

Serving Hamilton's children and families since 1894.

Au service des enfants et des familles de Hamilton depuis 1894.

The Children's Aid Society of Hamilton

Request for Proposal

For

Rebranding

Request for Proposal No.: 21-02
Issued: July 19, 2021

Proposal Submission Deadline: August 9, 2021 1:30 PM EDT

Table of Contents

Contents

Table of Contents	2
1. Introduction.....	4
1.1 The Goods/Services	4
1.2 Contract Award.....	4
1.3 Definitions.....	4
2. General Information and Instructions	5
2.1 Timetable.....	5
2.2 Questions or Inquiries.....	6
2.3 Addenda.....	6
3. Submissions	6
3.1 Submissions Made Only in Prescribed Manner.....	6
3.2 Acceptance, Revocation and Rejection of Proposals	7
3.3 Limitation of Legal Rights and Limitation of Liability.....	7
3.4 Freedom of Information and Protection of Privacy Act	8
3.5 Conflict of Interest.....	8
4. Evaluation of Submissions.....	8
4.1 Selection Committee.....	8
4.2 Evaluation of Submissions.....	9
4.3 Clarifications.....	10
4.4 Authority	10
5. Information for Proponents	10
5.1 Insurance.....	10
5.2 Workers Compensation Board.....	10
5.3 Canada Free Trade Agreement and the Comprehensive Economic and Trade Agreement	11
5.4 Accessibility for Ontarians with Disabilities Act.....	11
5.5 Child, Youth & Family Services Act- Part X Records & Compliance.....	11
6. Terms of Reference	12
7. Execution of Purchase Order/Agreement.....	12
7.1 Selection of Supplier.....	12
7.2 Failure to Execute the Purchase Order	13
7.3 Conflict of Interest.....	13
APPENDIX A – SOCIETY INFORMATION AND REQUIREMENTS	14
1. Society Contact Information	14
2. General Requirements.....	14
3. Proposal Requirements	15
APPENDIX B – BACKGROUND FOR REBRANDING PROJECT	17
APPENDIX C - SUBMISSION FORM	18

APPENDIX D – RATE BID FORM 20
APPENDIX E – MISSION, VISION and VALUES..... 21

1. Introduction

The Children's Aid Society of Hamilton (the "Society" or "Hamilton CAS") was established in 1894 as a not-for-profit charitable organization focusing on the well-being and protection of children. The Society is mandated under the *Child Youth and Family Services Act (CYFSA)* of Ontario and, as such, is required by law to protect children from physical, sexual and emotional abuse, and harm. The Society receives most of its operating revenue (approximately 92%) from the province of Ontario through the Ministry of Children, Community and Social Services (MCCSS). Other revenue is derived from federal government programs, property rental and fundraising activities.

The Children's Aid Society of Hamilton operates with the direction of a volunteer Board of Directors. The Society has approximately 270 employees (professional social workers, support and administrative staff), 395 children in care, and 133 foster and kin care homes.

The Mission, Vision and values are attached as Appendix E.

This process is subject to the Terms of Reference set out in Part 10 of this Request for Proposal.

1.1 The Goods/Services

This Request for Proposal (RFP) is a request to suppliers to put forward a proposal for the provision of goods/services to The Children's Aid Society of Hamilton ("Society" or "Hamilton CAS").

Information about the Society and its requirements are set out in Appendix A.

1.2 Contract Award

The selected supplier will enter into a contract with the Society.

1.3 Definitions

Whenever used in this RFP, or any other forms, which might be part of a Proposal or of the Agreement document, the following words shall be deemed to have meanings as indicated below:

"Agreement" means a contract(s) that may be entered into by Hamilton CAS with a successful Proponent(s) for the delivery of the project described in this RFP;

"Business Day" means any working day, Monday to Friday inclusive, excluding statutory and other Statutory holidays, namely: New Year's Day; Good Friday; Easter Monday; Family Day; Victoria Day; Canada Day; Civic Holiday; Labour Day; Thanksgiving Day; Remembrance Day; Christmas Day; Boxing Day and any day which the Society has elected to be closed for business. All references to dates/days in this Quotation are to Business Days, unless expressly set out otherwise. All references to dates/days in any Proposal submitted shall also be to Business Days.

"Closing Date" means the day, specified above, on which the RFP will close;

"Closing Time" means the time, specified above, at which the RFP will close;

"Contractor" means a service provider to whom an Agreement is awarded by Hamilton CAS for any or

all of the project described in the RFP;

“Proponent/Supplier” means the legal entity proposing to offer the Deliverables outlined in the RFP, and that is responsible for the RFP submission.

“RFP/Request for Proposal” means this request for proposal including all forms included in the RFP; and

“Selection Committee” means the committee comprised of representatives selected by Hamilton CAS, in its sole discretion, to evaluate Proposals.

2. General Information and Instructions

The Children’s Aid Society of Hamilton is seeking a qualified and experienced branding/marketing agency to support the redesign of the brand for Hamilton CAS. This project has the potential for multiple phases, but this proposal is for Phase 1 of the project. The rebranding project will include soliciting feedback from stakeholders (internal and external), updating the logo and developing a tag line.

2.1 Timetable

The following is the schedule for this Request for Proposal:

Issue Date of Request for Proposal	July 19, 2021
Deadline for Inquiries	August 3, 2021, 11:30 AM EDT
Issue of Addenda	August 4, 2021, 4:30 PM EDT
Closing Date and Closing Time	August 9, 1:30 PM EDT
Interview Notification:	August 11, 2021
Potential Interview/ Presentation:	August 16 or August 18
Contract Start Date:	Sept 1, 2021

This timetable is tentative only and may be changed by the Society at its sole discretion.

2.2 Questions or Inquiries

It is the sole responsibility of the Proponent to clarify the interpretation of any items in this RFP. All inquiries regarding this Request for Proposal should be directed by e-mail, and/or telephone to the Society Representative as set out in Appendix A (Society's Information and Requirements). **Deadline for questions or inquiries is August 3, 2021, 11:30:00 AM EDT. Inquiries submitted after this date and time will receive no response.**

Answers provided to any substantive questions received will be issued as an addendum in accordance with Section 2.3. Hamilton CAS reserves the right at its sole discretion to not answer non-substantive questions.

2.3 Addenda

Hamilton CAS reserves the right to issue addenda about this RFP for any reason including without limitation, to amend or revise the RFP, to respond to questions, to disclose changes in the schedule, to extend the closing date and closing time, to modify the Proposal format or requirements, or any other matter. Answers to all substantive questions will be provided in the form of written addenda. Addenda to this RFP shall be deemed part of this RFP.

All addenda related to this RFP will be issued by Hamilton CAS by the deadline indicated in Section 2.1 and will be posted electronically to the site where the RFP was originally posted. ([Broader Public Sector Accountability - The Children's Aid Society of Hamilton \(hamiltoncas.com\)](https://www.hamiltoncas.com))

Proponents shall be solely responsible to ascertain that they have received all addenda prior to submitting their Proposal. Hamilton CAS is not responsible in any way to ensure the completeness of information received by Proponents.

3. Submissions

All Proposals must be submitted no later than the closing date and closing time. Hamilton CAS will not accept Proposals received after the closing date and closing time.

The Society reserves the right in its sole discretion to extend the closing date, closing time and the acceptance period for any reasonable length of time. Notwithstanding this right and any timelines as may be identified herein, all Proposals shall be open for acceptance by Hamilton CAS for a period of not less than 90 days after the closing date and closing time.

3.1 Submissions Made Only in Prescribed Manner

To be eligible for consideration, you must complete and submit the Submission Form set out in Appendix C (Submission Form), and thereby acknowledge your acceptance of the terms and conditions of this Request for Proposal. **A completed proposal will include** the Submission Form (Appendix C), the Rate bid form (Appendix D) - both word and excel versions, and a proposal which addresses Appendix A, Section 3.2.

You should provide your Proposal by e-mail to the Society Representative named in **Appendix A Section 1**. Any unaltered Proposals submitted by e-mail to the Society Representative are deemed received once the e-mail has entered the e-mail inbox of the Society Representative.

Proposals are to be directed only to the Society Representative. The Society Representative will confirm receipt of all Proposals at their discretion. If you do not receive confirmation of receipt of your Proposal, it is your responsibility to ensure that the Society Representative has properly received your Proposal. The Society shall not be responsible for any e-mail delivery issues or any other technical problems about the submissions.

Proponents may modify their Proposals at any time up to the closing date and closing time, by written amendments submitted to the Society Representative. Amendments shall clearly indicate the name of the Proponent, the date of Proposal, and reference the RFP number. Amendments to Proposals will not be accepted after the closing date and closing time.

All Proposals are to be in English.

3.2 Acceptance, Revocation and Rejection of Proposals

This RFP is a request for proposal only and is not an offer to buy or lease any equipment, property or services. The provision of this RFP to a Proponent nor acceptance or receipt of a Proposal will imply neither any obligation nor commitment on the part of Hamilton CAS to enter into an agreement or contract of any kind in respect of any or all contents of this RFP. Hamilton CAS may cancel this invitation at any time, in whole or in part, for any reason whatsoever and without incurring any liability to anyone who has submitted a Proposal or intends to submit a Proposal.

Hamilton CAS is not obligated in any way to pay for costs of any kind or nature whatever, that may be incurred by a Proponent or any associated third parties, in the preparation of Proposals, making presentations, demonstrations or samples before or after the Closing Date and Closing Time. All such associated costs shall be the sole responsibility of the Proponent. All Proposals and supporting documentation will be retained by and will become the property of Hamilton CAS, subject to claims of confidentiality in respect of the Proposal and support documentation. In addition to all other rights reserved by Hamilton CAS in this RFP, Hamilton CAS has the right, in its sole and unfettered discretion, to:

- Assess the relative merits and advantages of each of the Proposals,
- Reject or accept any Proposal, including the right to accept non-compliant Proposals or to reject all Proposals,
- Waive any irregularities or informalities contained in any Proposal,
- Accept the withdrawal of any Proposal as permitted under this RFP,
- Decide not to negotiate with any Proponent(s) or not to enter into any agreement with any Proponent(s),
- Decide to negotiate with any Proponent(s) or to enter into an agreement with any Proponent(s), irrespective of whether the Proposal submitted by the Proponent(s) is incomplete, irregular, conditional, non-compliant or fails to provide all the information required in this RFP, and
- During the negotiation phase after the RFP Closing Date and Closing Time, negotiate terms and conditions with any Proponent that may be different from those contained within this RFP or the Proposal of the Proponent, without being required to offer such terms and conditions to the other Proponents.

3.3 Limitation of Legal Rights and Limitation of Liability

By submitting a Proposal, each Proponent agrees that, in the event that a court should find that Hamilton

CAS is liable for anything arising in connection with: this RFP, the provision of a Proposal, the selection of the successful Proponent, any negotiations following the provision of a Proposal, or any representation made by Hamilton CAS, the Proponent shall not be entitled to claim for damages or other legal relief whatsoever, and in particular, the Proponent waives any claim for lost profits in the event that no agreement is entered into between the Proponent and Hamilton CAS.

3.4 Freedom of Information and Protection of Privacy Act

Effective January 1, 2012, the Freedom of Information & Protection of Privacy Act (the “Act”) applies to all records in the custody or control of the Society.

The Act, as amended, applies to information provided to the Society by a Proponent. A Proponent should identify any information in its Proposal or any accompanying documentation supplied in confidence for which confidentiality is to be maintained by the Society (the “Personal Information”). The confidentiality of such Personal Information will be maintained by the Society, except as otherwise required by law or by order of a court or tribunal. Proponents are advised that their Proposals will, as necessary, be disclosed on a confidential basis, to the Society’s advisers retained for the purpose of evaluating or participating in the evaluation of their Proposal.

By submitting any Personal Information requested in this RFP, Proponents are agreeing to the use of such information as part of the evaluation process, for any audit of this procurement process and for contract management purposes. Where the Personal Information relates to an individual assigned by the Successful Proponent to provide the Deliverables, such information may be used by the Society to compare the qualifications of such individual with any proposed substitute or replacement in accordance with the Performance by Specified Individuals Only paragraph of the Form of Agreement. If a Proponent has any questions about the collection and use of Personal Information pursuant to this RFP, questions are to be submitted to the Society Contact in accordance with the Bidders to Review RFP section.

A supplier that submits a Proposal consents to the Society’s collection of the information as described under this RFP for the uses contemplated under this RFP.

3.5 Conflict of Interest

The Proponent hereby declares by submitting a bid that they do not and will not have any conflict of interest, actual or potential, by providing a submission or completing the proposed work.

4. Evaluation of Submissions

4.1 Selection Committee

Upon receipt of Proposals and after the closing date and closing time, the selection committee will review each Proposal, ensure each Proponent’s compliance with the terms and conditions of this RFP, and rate each complying Proposal based on the evaluation criteria within this document. Proponents will be evaluated by the selection committee based on the quality and completeness of information given in the Proposal.

The determination of the members of the selection committee is at the sole discretion of Hamilton CAS and the identity of persons forming part of the selection committee will not be made known to the Proponents.

4.2 Evaluation of Submissions

Proposals will be evaluated on the basis of the supplier’s response to all information requested in this Request for Proposal including but not limited to the experience, proposed plan and proposed pricing, and any other requirements specified by the Society in subsection Part 2 of Appendix A.

The Society will evaluate this RFP in **two (2) stages**:

4.2.1 Stage I - Evaluation of Non-Financial Criteria

Total Points: 80 Points

Stage I will consist of scoring each qualified Proposal on the basis of the rated criteria. A minimum score of Fifty-Six (56) points out of the possible fifty (80) available points is required in order for the Proposal to advance to Stage II. Proposals which score less than Fifty-Six (56) points at Stage I will be eliminated from further evaluation and consideration. Please refer to **Appendix A, Section 3.2 – Experience and Qualifications** for the scoring criteria.

Non-Financial Criteria	Available Points
Experience and Qualifications	30 Points
Proposed Approach/Methodology	25 Points
Project Management	25 Points
Total Points	80 Points

Hamilton CAS may establish a short list of Proponents upon completion of an initial round of evaluations. The Society may request presentations relating to the Proposal from short listed Proponents. Additional information from the presentation/interview will be factored into the scoring of Stage 1. Proponents will be advised of presentation times in accordance with the timelines in Section 2.1.

4.2.2 Stage II- Evaluation of Pricing

Total Points: 20 Points

Pricing will be scored based on a relative pricing formula using the prices submitted by the supplier on the attached Appendix D - Rate Bid Form. This form is to be filled out and returned to the Society Representative to qualify for **Stage II** of the evaluation process. Each supplier will receive a percentage of the total possible points allocated to price by dividing that supplier’s price for the goods/services by the lowest price submitted.

For example, if the lowest price submitted for the goods/services is \$120.00, that supplier receives 100% of the points available (120/120= 100%). A supplier that submits a price of \$150.00 for the goods/services receives 80% of the points available for the goods/services (120/150= 80%). And finally, a supplier that submits a price of \$240.00 receives 50% of the points available for the goods/services (120/240= 50%).

Lowest rate

$$\frac{\text{rate } 2^{\text{nd}} \text{ lowest rates}}{\text{Lowest rate}} \times \text{Total available points} = \text{Score for Proposal with } 2^{\text{nd}} \text{ lowest}$$

Lowest rate

----- x Total available points = Score for Proposal with 3rd lowest
rate 3rd lowest rates

etc...for each Proposal

4.2.4 Cumulative Score and Selection of Highest Scoring Proponent

At the conclusion of Stage II, all scores from Stage I and Stage II will be added and, subject to the express and implied rights of the Society, the highest scoring Proponent will be invited to enter into discussions to finalize an Agreement.

4.3 Clarifications

Hamilton CAS reserves the right in its sole discretion to request clarification from a Proponent after the closing date and closing time to seek further information from the Proponent without any obligation to notify or seek further information from any or all other Proponents. Hamilton CAS also reserves the right to verify any or all information provided by the Proponents in their Proposals through third party investigations or any other means without notice to the Proponent.

4.4 Authority

Nothing in this RFP shall be construed as authority for any selected Proponent(s) to make commitments that shall bind Hamilton CAS to otherwise act on behalf of Hamilton CAS, except as Hamilton CAS may expressly authorize in writing.

5. Information for Proponents

5.1 Insurance

Proponents are advised that it is a Hamilton CAS requirement that for any Agreement entered into as a result of this RFP the Contractor shall, at its own expense and without limiting its obligations herein, provide and maintain policies of insurance as outlined below:

- Comprehensive General Liability insurance in an amount of not less than five million dollars (\$5,000,000) inclusive per occurrence against third party claims for bodily injury, personal injury, and property damage (including loss of use thereof). Such insurance shall cover all operations of the insured and include, but not being limited to: products and completed operations liability, blanket written contractual liability, owners and contractors protective liability, owners and employees as additional insured, and
- Insurance on property of others on an "all risks" basis, including theft, and in an amount sufficient to cover such property in the Contractor's care, custody and control.

5.2 Workers Compensation Board

Proponents are advised that it is also a Hamilton CAS requirement that for any Agreement entered into as a result of this RFP the Contractor shall provide a "Letter of Clearance" from The Workers' Compensation Board indicating its account is in good standing.

5.3 Canada Free Trade Agreement and the Comprehensive Economic and Trade Agreement

Proponents should note that procurements falling within the scope of the Canada Free Trade Agreement, Comprehensive Economic and Trade Agreement, and other trade treaties are subject to the provisions of those agreements, and the rights and obligations of the parties shall be governed by the specific terms of each particular tender call. For further reference see the Canada Free Trade Agreement website at:

https://www.ic.gc.ca/eic/site/062.nsf/eng/h_00053.html.ca/

And the Text of the Comprehensive Economic and Trade Agreement at:

<http://www.international.gc.ca/trade-commerce/trade-agreements-accords-commerciaux/agr-acc/ceta-aecg/text-texte/toc-tdm.aspx?lang=eng>

5.4 Accessibility for Ontarians with Disabilities Act

The Society is committed to the highest possible standards for accessibility. Selected Proponent(s) must be capable to recommend and deliver, as appropriate for each Deliverable, accessible and inclusive goods and/or services consistent with the Ontario Human Rights Code (OHRC), the Ontarians with Disabilities Act, 2001 (ODA) and Accessibility for Ontarians with Disabilities Act, 2005 (AODA) and its regulations in order to achieve accessibility for Ontarians with disabilities.

In accordance with Ontario Regulation 429-07 made under the Accessibility for Ontarians with Disabilities Act, 2005 (Accessibility Standards for Customer Service), the Society has established policies, practices and procedures governing the provision of its goods and services to persons with disabilities.

5.5 Child, Youth & Family Services Act- Part X Records & Compliance

The Supplier and the Client acknowledge and agree that the provisions of Part X of the CYFSA will apply to and govern all Records effective January 1, 2020, will grant certain rights to individuals with respect to records of their Personal Information, and may permit the disclosure of such Records to third parties. The Supplier and the Client agree to comply with the requirements of Part X of the CYFSA. Furthermore, the Supplier agrees:

- (a) to keep Records secure;
- (b) to provide Records to the Client within seven (7) calendar days of being directed to do so by the Client for any reason including an access request or privacy issue;
- (c) not to access any Personal Information unless the Client determines, in its sole discretion, that access is permitted under Part X CYFSA and is necessary in order to provide the Deliverables;
- (d) not to directly or indirectly use, collect, disclose or destroy any Personal Information for any purposes that are not authorized by the Client;
- (e) to ensure the security and integrity of Personal Information and keep it in a physically secure and separate location safe from loss, alteration, destruction or intermingling with other records and databases and to implement, use and maintain the most appropriate products, tools, measures and procedures to do so;

- (f) to restrict access to Personal Information to those of its directors, officers, employees, agents, partners, affiliates, volunteers, or subcontractors who have a need to know it for the purpose of providing the Deliverables and who have been specifically authorized by the Client Representative to have such access for the purpose of providing the Deliverables;
- (g) to implement other specific security measures that in the reasonable opinion of the Client would improve the adequacy and effectiveness of the Supplier's measures to ensure the security and integrity of Personal Information and Records generally; and
- (h) that any confidential information supplied to the Client may be disclosed by the Client where it is permitted to do so under the CYFSA, by an order of a court or tribunal or pursuant to a legal proceeding;

6. Terms of Reference

These provisions apply to this Request for Proposal

- neither party shall have the right to make claims against the other with respect to this process, the selection of any supplier, the failure to be selected to receive the purchase order, or the failure to honour submissions prior to the issue of a purchase order;
- no legal relationship or obligation regarding the procurement of any goods or services shall be created between any supplier and the Society prior to the issue of a purchase order by the Society;
- the terms and conditions of the purchase order are non-negotiable;
- any quantities detailed in Appendix A represent the estimated requirements of the Society at the time this RFP is issued, and Society may, at its sole discretion, vary the quantity before the Society issues a purchase order to the successful supplier;
- The Society may make public the names of any or all suppliers;
- The Society may elect not to consider a supplier whose submission contains misrepresentations or any inaccurate, misleading or incomplete information;
- The Society may cancel this process at any time;
- the supplier agrees to all of the terms set out in this RFP.
- All pricing must be in **Canadian Funds**.

7. Execution of Purchase Order/Agreement

7.1 Selection of Supplier

Upon selecting a supplier, the Society Representative will notify the selected supplier by contacting the Supplier's Representative as specified in the supplier's Submission Form (Appendix C).

The Society will issue a purchase order or enter into a formal agreement with the selected supplier. The issuance of a purchase order from the Society or an agreement will constitute a legally binding offer to enter into a contract.

7.2 Failure to Execute the Purchase Order

The selected supplier is expected to execute the purchase order within the Timeframe for Delivery set out in section 2.1 of Appendix A. The failure to do so may result in the selection of another supplier.

7.3 Conflict of Interest

If, at the sole and absolute discretion of the Society, a supplier is found to be in a Conflict of Interest, the Society may, in addition to any other remedies available at law or in equity, choose not to consider the Proposal submitted by the supplier.

[Appendix A follows this page.]

APPENDIX A – SOCIETY INFORMATION AND REQUIREMENTS

1. Society Contact Information

Society Representative	Tracy Maclsaac
Title	Senior Manager of Communications
Phone Number	(905) 522-1121 ext 6465
E-mail Address	tmacisaac@hamiltoncas.com

2. General Requirements

The Children’s Aid Society of Hamilton is seeking a qualified and experienced branding/marketing agency to support the redesign of the brand for Hamilton CAS. This project has the potential for multiple phases, but this proposal is for Phase 1 of the project. The rebranding project will include soliciting feedback from stakeholders (internal and external), updating the logo and developing a tag line.

Additional information regarding the Society and this project can be found in Appendix B.

2.1 Term of Agreement

The work contemplated by this RFP is to be completed no later than March 31, 2022.

2.2 Description of Services

The Children’s Aid Society of Hamilton is seeking a branding/marketing company to assist with the following as Phase 1 of the project:

- Develop a strategy to solicit feedback from internal and external agency stakeholders. The strategy should include both qualitative and quantitative approaches.
- Work collaboratively with the agency’s branding sub-committee which will inform each stage of the work.
- Use stakeholder feedback to create a new logo and tagline for the agency that reflects the agency’s strategic vision, guiding principles, commitment to equity and inclusion and customer service.
- Create an online branding guide.
- Design relevant marketing tools such as templates and brochures.
- Be available to support additional projects, which would be subject to separate discussions regarding fees.

The Society may extend the contract, at their discretion, to assist with implementation of the plan.

2.3 Payment Terms

The Successful Proponent will invoice monthly to the Children’s Aid Society of Hamilton. Standard payment terms of NET 30 days will apply.

2.4 Target Date and Location for Receipt of Goods

Children's Aid Society of Hamilton expects to begin services under this contract on or before September 1, 2021 in accordance with the terms and conditions of the Purchase Order/Agreement that will be issued by Children's Aid Society of Hamilton to the selected Contractor.

3. Proposal Requirements

3.1 Submission Requirements

Please submit your Proposal along with completed forms 'Appendix C – Submission Form' and 'Appendix D - Rate Bid Form' (word and excel documents)

Total Price Proposals shall be provided in **Canadian funds**, inclusive of all applicable duties and exclusive of the Harmonized Sales Tax (HST), as applicable.

3.2 Experience and Qualifications Requirements **Eighty Points (80 Points)**

Each Supplier will be scored on the following Non-Financial Criteria for Stage I of the Evaluation process. The following items should be included in the Proposal:

- a) Experience and Qualifications: (30 Points)
 - Description of your organization, including years of experience, history, locations
 - Profiles of your staff who will be working with the Society
 - Summary of services and any related work similar to this RFP from the deliverables in Section 2.2
 - An outline of your organization's experience with not for profit organizations
 - Reference feedback will be evaluated in this category

- b) Proposed Approach/ Methodology (25 Points):
 - Include a clear description of the work to be performed and the anticipated methodology used to complete the work
 - An example project timeline, with clearly labelled deliverables
 - Clearly articulate how you will engage with the branding sub-committee
 - A critical part of this work will be soliciting feedback from internal and external agency stakeholders. The proposal should articulate a proposed strategy.
 - Include five relevant questions that you would use to engage stakeholders.
 - The Proposal may include discussion of alternative tasks or areas of work which the Proponent believes will better enable the Society to reach its objectives for this RFP. If the Proposal contains any such alternatives, the Proposal must clearly identify the ways in which the Proposal would modify the scope of work as presented in this RFP, and these alternatives be clearly identified in the proposed work plan.

- c) Project Management (25 Points):
 - Clearly identify the Proponent's project manager
 - Please specify the number of hours estimated to complete this work
 - How will you track project milestones and meet timelines and deadlines for the project?
 - How you will you communicate progress to the sub-committee?

3.3 References

Please provide references from three (3) clients who have recently obtained similar services from the supplier's company. Indicate the company name, a brief description of the project and the name, title, telephone number and email address of a reference who is knowledgeable about the search and who may be contacted by proposal evaluators.

APPENDIX B – BACKGROUND FOR REBRANDING PROJECT

Background

The Children's Aid Society of Hamilton, in partnership with families and our community, is committed to the safety, protection, and well-being of children and the strengthening of families, while valuing diversity and promoting equity.

The Children's Aid Society of Hamilton is evolving. In 2019 the agency launched a new strategic vision. It outlines six areas of focus to guide the agency's work over a five-year period. These guiding principles include:

- A commitment to keeping children safe with their family and in their community
- Providing service and centering decisions on the needs and voice of children, youth and families
- Achieving permanency for children and youth involved with the agency and supporting children and youth to reach their full potential
- Centering equity and inclusion in the agency's guiding principles
- Creating a healthy workplace
- Enhancing relationships and partnerships with identified communities

We want to ensure that the agency's brand reflects its strategic vision, guiding principles, commitment to equity and inclusion and customer service.

Further details regarding the strategic vision can be found in the Service Plan at [Service Plan 2019-20 Review and Update \(hamiltoncas.com\)](#) and in the annual report [Community Report 2020 \(hamiltoncas.com\)](#)

Challenge/Opportunities

While approximately 97% of child welfare work happens with children in their own homes, Children's Aid Societies are often only known for protection services and removing children from their home. There is a lack of knowledge about other services that agencies provide, and this project is an opportunity to build a profile that would help us effectively communicate that as an agency our goal is to be viewed as:

- Having an integrated approach to working together with professional partners, local communities and families to provide equitable services to children, youth and families within the city of Hamilton;
- Providing early help and support to help families access supports and services in the community that help children and families thrive;
- Advocating for children, youth and families to support the right services at the right time;
- Keeping children and youth safety with their families and in their community whenever possible;
- Supporting youth success for youth in care and in the community.

Goal

We want our community to know we are changing. One way we are signaling this shift visibly is with a change in our logo and creating a tagline. Rebranding is one step to cultivate change within the agency and re-position the agency. A new logo and tagline are the creative, visible pieces of this work and alone will not change the perception of how we are viewed, that comes from how we work with clients and stakeholders.

APPENDIX C - SUBMISSION FORM

INSTRUCTIONS TO SUPPLIERS: Please complete this Submission Form and return this Submission Form with your Proposal to the Society Representative by the date specified in Section 2.1 of General Information and Instructions.

Proposal Number: **2021-02**

To: The Children's Aid Society of Hamilton

1. Supplier Information

a. The full legal name of the Supplier is:

b. Any other relevant name under which the Supplier carries on business:

c. The Supplier's address, telephone and facsimile numbers are:

Address:

Telephone:

Fax:

d. The name and title of the Supplier's Representative:

Name:

Title:

e. The mailing address, phone number and e-mail address of the Supplier's Representative:

Address:

Telephone:

E-mail Address:

2. Submission Requirements and Accuracy of Information

The Supplier accepts the terms as set out in this RFP. While the Proposal in this Submission Form is provided for evaluation purposes only and is not legally binding, the supplier hereby confirms that the information provided is accurate.

3. Conflict of Interest

The Proponent hereby declares by submitting a bid that they do not and will not have any conflict of interest, actual or potential.

[SUPPLIER INSTRUCTIONS: SET OUT THE FULL LEGAL NAME OF THE SUPPLIER]

I acknowledge that providing my name on the line below in electronic form will constitute a signature for the Purposes of the Electronic Commerce Act, 2000, S.O. 2000, c. 17.

I have authority to bind the Supplier Per:

Signature: _____

Name: _____

Title: _____

Date: _____

APPENDIX D – RATE BID FORM

Instructions

- Proponents must not amend this Form in any way other than by providing the requested information.
- No other fees or charges are payable for the Deliverables other than those set out on this Form.
- Where no price applies, state '0' or 'nil'. Your Proposal may be disqualified if a price category is left blank.

All Pricing must be in Canadian Funds

RATE BID FORM RFP NO: 21-02

*I/we have read and understand all of the specifications, terms and conditions of this Request for Proposal, **Rebranding**, and hereby submit the following tendered prices:*

Please fill out the Appendix D Rate Bid Form (Excel attachment) provided as an attachment to your Proposal and submit it as a separate document. Proponent proposal will not have any pricing embedded into any other file other than the attached Appendix Rate Bid Form.

Legal Name of Proponent/Company: _____

Name and Title of Signing Authority: _____

Signature: _____

I have authority to bind the Proponent/Company.

Dated this _____ day of _____, 2021

APPENDIX E – MISSION, VISION and VALUES

Our Vision:

A community where every child is a gift to be valued, nurtured, and kept safe.

Our Mission:

The Children’s Aid Society of Hamilton, in partnership with families and our community, is committed to the safety, protection, and well-being of children and the strengthening of families, while valuing diversity and promoting equity.

Our Values:

Children

Children developing to their full potential within a safe and healthy environment. Positive, permanent relationships for children and youth.

Families

The essential role of family in the lives of children.

Partnerships

Respectful communication and collaboration with children, families, agency colleagues, and community.

Quality Service

- Personal integrity
- Pursuit of professional excellence
- Progressive approach to services delivery
- Effective and efficient use of resources