



Invitational Tender

For

Facilitated Processes and Effective Communication Trainer

Invitational Tender #2013-47

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1. Introduction

- 1) This Invitational Tender is issued by PTCC - Cancer Care Ontario (“**CCO**”) as an invitation to prospective vendors to provide **Facilitated Processes and Effective Communication Training** for staff within the Program Training and Consultation Centre (PTCC).
- 2) In this Invitational Tender, all prospective bidders to this Invitational Tender are referred to as the “**Vendor**” and the Vendor’s submission is referred to as a “**Response**”. Each Vendor shall be represented by a representative (“**Vendor Representative**”) for the purpose of submitting the Vendor’s Response.
- 3) Each Vendor is required to submit information in their Response according to the instructions contained herein. The Vendor shall be responsible for all costs and expenses associated with the development and submission of a Response. CCO wishes to thank all Vendors for participating. CCO will notify unsuccessful Vendors via emailed letter to the Vendor Representative listed in the Response.

1.1 Description of CCO

CCO is the provincial agency responsible for continually improving cancer services. As the government’s cancer advisor, it:

- Directs and oversees more than \$600 million public health care dollars to hospitals and other cancer care providers to deliver high quality, timely cancer services;
- Implements provincial cancer prevention and screening programs designed to reduce cancer risks and raise screening participation rates;
- Works with cancer care professionals and organizations to develop and implement quality improvements and standards;
- Uses electronic information and technology to support health professionals and patient self-care to continually improve the safety, quality, efficiency, accessibility and accountability of cancer services;
- Plans cancer services to meet current and future patient needs, and works with health care providers in every Local Health Integration Network to continually improve cancer care for the people they serve; and
- Rapidly transfers new research into improvements and innovations in clinical practice and cancer service delivery.

CCO is committed to conducting procurement processes that conform to the following principles:

- The procurement process must be conducted in a fair and transparent manner, providing equal treatment to qualified vendors in accordance with CCO’s internal policies and procedures;
- Conflicts of interest, whether real or perceived, must be avoided during the procurement process;
- Value for money must be demonstrated for each procurement;
- Goods and services procured by CCO must be responsibly managed; and
- Vendors must be able to compete for business in a geographically neutral environment.

1.2 CCO Background

CCO Strategic Initiatives

As the government's cancer advisor, CCO works to reduce the number of people diagnosed with cancer, and make sure patients receive better care every step of the way. Cancer Care Ontario created the first comprehensive provincial cancer services and cancer control plan in 2004, the Ontario Cancer Plan. The first of its kind in Canada, the Ontario Cancer Plan is a three-year roadmap for how CCO, the Ontario government and all those involved in cancer prevention and care will reduce the number of people diagnosed with cancer and continually improve patient care. Two complementary provincial strategies underpin the Ontario Cancer Plan: Targeting Cancer: An Action Plan for Cancer Prevention and Detection (Cancer 2020), the province's cancer prevention action plan, and the Information Management/Information Technology Strategic Plan (collectively, the "**CCO Strategic Initiatives**").

Please visit CCO's website, <http://www.cancercare.on.ca/>, for more information.

1.3 Description of the Opportunity and Purpose of Invitational Tender

1.3.1 Background

The Program Training and Consultation Centre (PTCC), founded in 1993, plays a leading role in providing training and technical assistance in comprehensive tobacco control to local communities in Ontario through training, consultation, resource development, media analysis and referral services. For more information please refer to: <http://www.ptcc-cfc.on.ca>.

1.3.2 Services in Scope

PTCC requires the services of a Trainer to develop and deliver the following training events:

1. One 2 day in-service training session (at a Toronto location). This session will include:
 - a. A one day in-person workshop for approximately 12 PTCC staff to build knowledge and skill to plan and manage facilitated sessions for local public health practitioners in tobacco control and their community partners in the form of workshops, webinars, meetings and consultations.
 - b. A second full day in-person session that provides more in-depth knowledge sharing and skill building opportunities for PTCC staff who plan and facilitate sessions (trainings, meetings and consultations) as a job requirement (approximately 4-7 staff)
2. Up to 3 – one day workshops (in-person) for public health practitioners (tobacco control and healthy eating and active living) at 3 locations to be determined across Ontario. Scheduling of the workshops will occur in consultation with the chosen trainer and will include up to 30 participants.

The Trainer shall provide the following services as may be modified or amended at the sole discretion of CCO-PTCC:

1) Two-Day Training Session for PTCC staff

The two-day workshop will include knowledge and skill-building in the area of workshops, webinars, meetings and consultations facilitation: planning, design, delivery and evaluation. The two days do not have to occur consecutively but should occur within a reasonable time frame and must occur before the end of the agreement.

- a) The first day will include training for approximately 12 PTCC staff.

- b) A second day of training is required for approximately 4-7 staff to receive more in-depth training and practice opportunities. PTCC staff who will participate in the second day of the training are directly responsible for i) planning and delivering consultations to tobacco control and healthy eating and active living practitioners working in Ontario's 36 public health departments or one of their community partners, and ii) facilitating working groups and networks of public health departments and community partners.

2) Up to 3 one day workshops for tobacco control practitioners working in public health

The one day in-person workshop, facilitation skills for community based tobacco control, will be delivered **up to 3** times for public health departments across Ontario and may be tailored for the public health department as identified through a brief needs assessment (e.g. a health department that is interested in facilitating a community meeting on tobacco control, or facilitating a meeting with their Board of Health to discuss tobacco control policy initiatives and build support for a local bylaw amendment). This workshop will provide the local public health department staff with the essential skills to facilitate a variety of sessions which may include: a session to engage community partners and build support for a policy initiative, achieving consensus in a working group, and planning meetings for comprehensive tobacco control or healthy eating and active living.

Focus of the workshops

The focus for #1 and #2 above will be on a consistent and practice-based approach to facilitation design and delivery and effective communication including the following points dependent on the audience (PTCC or public health department staff):

- Adult learning principles
- Best Practices in facilitation design, delivery and management
- Types of facilitated processes (tailored to PTCC's service delivery model)
- Defining the purpose of the session, objectives and deliverables
- Defining the approach; facilitation management styles and customizing for your audience
- Developing and/or selecting supporting materials/tools; matching the materials to the process and the needs of the participants
- Managing time efficiently
- Facilitation techniques to promote the transfer of knowledge and skill or manage meetings to achieve a specific goal or consensus building (e.g. presenting content to leading a group of adult learners, facilitating a consultation)
- Effective Presentation techniques
- Evaluation and self-reflection (assessing strengths as a facilitator)
- Hands-on facilitation skill building opportunities
- Tips about how to identify and effectively manage difficult situations including conflict

The Trainer will be required to:

1. Meet with the PTCC Team Lead(s) and other PTCC staff (as required) to identify learning needs and define the scope of the in-service training and the external workshop (public health staff) (up to 8 hours; depending on location of Trainer in-person meetings are preferred)
2. Conduct interviews (via teleconference, CCO-PTCC will provide teleconferencing number if needed) with other PTCC staff (up to 4 staff) to learn more about the facilitated services that PTCC delivers, identify learning needs and define the scope of the in-service training and the external workshop
3. Develop the in-person training session and the external workshop in consultation with the PTCC Team Lead(s) and other PTCC staff as needed, including the development of workshop materials, hands on exercises and a resource listing. The trainer will also develop a short list of questions that may be administered by the trainer or PTCC staff to assess the needs of the participants so that the workshop may be tailored accordingly. Content and design of materials will be in consultation with and shall be approved by the PTCC Team Lead(s). CCO-PTCC will coordinate the printing of materials as agreed upon by Trainer and Team Lead(s)
4. Develop a training evaluation form for the in-person session to include next steps for each workshop participant. PTCC has an evaluation form for use in the external workshop.
5. Deliver a 2 day in-person training at a downtown Toronto location (TBD); including training material set-up and wrap up. CCO will supply audio visual equipment (laptop, projector, and video screen). Trainer will distribute materials at the workshop.
6. Deliver up to 3 one day in-person trainings at locations to be determined; including training material set-up and wrap up. The hosting health department will supply audio visual equipment (laptop, projector, and video screen). Trainer will distribute materials at the workshop.
7. Post training delivery – debrief and review evaluation reports and next steps
8. Travel and accommodation (please refer to CCO policy)

Expected Outcomes for the workshops:

After completing this workshop staff will:

1. Gain a sound understanding of:
 - Adult learning principles and confidently apply them to the design, delivery and management of facilitated sessions including workshops, consultations and meetings
 - Best practices in facilitation design and delivery
 - Facilitation techniques to promote the transfer of knowledge and skill or manage meetings to achieve a specific goal or consensus building
2. Be able to:
 - Assess and define the facilitation approach and activities to meet needs and learning styles and their facilitation strengths
 - Confidently plan and deliver facilitated sessions: assess needs, define the purpose, objectives, deliverables and
 - Develop and/or select supporting materials
 - Evaluate the session

Experience and Competencies Requirements

The Respondent(s) should possess the following experience and competencies:

- Solid understanding and application of Adult Learning Principles
- Expertise in planning and managing facilitated sessions including workshops, meetings and consultations
- Strong facilitation skills and the ability to alter training delivery to adapt to participant's needs
- Ability to conduct a learning needs assessment and the flexibility and ability to tailor training to meet the varied needs of training participants
- Experience in the development and design of facilitated sessions and accompanying materials
- Experience in training delivery and evaluation
- Experience in coaching and team building
- Strong communication and presentation skills
- Strong motivation skills
- Knowledge or experience working with public sector, preferably with public health

2. Procurement Process Overview

2.1 Procurement Process Overview

The Procurement Process for this Invitational Tender is as follows:

- 1) **Invitational Tender** – The Invitational Tender is intended to identify and select a suitable Vendor to provide Event Planning Services to CCO. This Invitational Tender will identify a Vendor with the interest, capability and capacity to provide the Event Planning Services.
- 2) **Vendor Presentation** – Should CCO elect to shortlist vendors, vendor representatives may be required to attend a presentation session in person at CCO premises
- 3) **Contracting Stage** – The successful Vendor from the results of the Invitational Tender Stage and the Vendor Presentation stage (if any), will be recommended to enter into contract negotiations with CCO.

2.2 Rules Applying to Subcontracting

Vendors may engage the services of subcontractors in providing services contemplated in this Invitational Tender, subject to the following conditions:

- 1) CCO intends to contract only with a single Vendor (the "**Prime Vendor**") who will be accountable for the delivery of all of the Services. The Prime Vendor will maintain a direct contractual relationship with CCO through the Services Agreement.
- 2) If delivering any Services to CCO, each subcontractor must be identified by the Prime Vendor, for the benefit of CCO, be subject to the same terms and conditions of the Services Agreement. The contractual relationship between the Prime Vendor and the subcontractor relating to the provision of the Services to CCO is subject to review and approval by CCO.
- 3) The Prime Vendor will be responsible for the management and compensation of its subcontractors and will be jointly and severally liable for the acts and/or omissions of such subcontractors. The

Prime Vendor will serve as a single point of contact to CCO, including for the purposes of coordination, quality assurance, issues escalation, and reporting.

2.3 Invitational Tender Timeline and Deadlines

All dates listed in this Invitational Tender (the “Invitational Tender **Milestones**”) may be subject to change at the discretion of CCO. Any change to a date set out in the Invitational Tender Milestones with respect to the Invitational Tender process will be issued by addendum.

Item	Event	Date	Time
1	Posting Date	February 28, 2013	-
2	Bid Responses Due	March 8, 2013	11:00AM EST
3	Interviews of Short-listed Candidates	March 11-13, 2013	
4	Vendors notified	Week of March 18, 2013 (anticipated)	-
5	Vendor Commences work at CCO	Week of March 25, 2013 (anticipated)	-

3. Response Instructions

3.1 Procedures Regarding Submission of Response Package

The Vendor must submit the Response following the prescribed format and order:

1) Vendor and Response Requirements:

- I. [Appendix A – Vendor Acknowledgement & Offer Form](#)
- II. [Appendix B – Vendor Knowledge & Experience](#)
- III. [Appendix C – Pricing Response](#)
- IV. [Appendix D – Tax Compliance Declaration](#)
- V. [Appendix E – References](#)

2) **The Vendor’s Single Point of Contact for this Invitational Tender:**

Sophia Little (“**Bid Administrator**”)
 Procurement Coordinator
 Email address: Sophia.Little@cancercare.on.ca
 Fax number: (416) 971-6888

- 3) Each Vendor is responsible for the electronic submission of their response by **11:00:00 AM EST**, as indicated on CCO’s clock (the “**Closing Time**”) on, **March 8, 2013** (the “**Closing Date**”). Responses received after the Closing Time on the Closing Date will not be considered.
- 4) Each Vendor must include pricing using the form provided in Appendix D entitled Pricing Response and **shall ensure that no other pricing information is included elsewhere in their submission**. Failure to comply with this requirement may result in disqualification of the vendor’s submission.
- 5) It shall be the responsibility of the Vendor to ascertain that it is in possession of a complete set of Invitational Tender documents and to thoroughly acquaint itself with those documents. Vendors shall check with the Bid Administrator, concerning any discrepancies, omissions or additional information required. After submitting a Response, Vendors shall not claim that there was any misunderstanding with respect to the conditions imposed by the Invitational Tender.

- 6) Each Vendor is fully responsible for the validity and accuracy of its Response, including but not limited to costs and rates.
- 7) All Responses and supporting documentation will become the property of CCO. If any part of the Response is to be considered confidential, Vendor shall clearly identify which portion of its Response is to be considered confidential. Notwithstanding that the Vendor may identify portions of its Response as confidential, CCO may share and disclose the Vendor's entire Response to any of CCO's employees, officers, directors or professional advisors, including technical advisors, who have a need to know the Vendor's Response for the purpose of evaluating same and for any other reason relating to this Invitational Tender, or the procurement of the services herein.

3.2 Questions and Clarifications

- 1) Point of Contact:

The single point of contact for this Invitational Tender is the Bid Administrator contact noted in Section 3.1 above. Vendors must not contact staff of CCO, nor any past or present Vendors (including any independent contractors) that perform services whether directly or indirectly related to CCO.

- 2) Written Questions:

All questions must be in writing and submitted via e-mail no later than **March 5, 2013, 11:00AM EST**. Questions should contain the exact subject line wording: [Name of Bidder] **Questions regarding Invitational Tender # 2013-47: Facilitated Processes Trainer**. A confirmation email will be returned to the sender acknowledging receipt of each inquiry.

- a. Enquiries will be answered with copies of both questions and any answers to all Vendors by **March 6, 2013, 5:00 PM EST**. CCO will examine the enquiries and will decide whether or not to provide additional information in a Response.

No questions are to be considered proprietary or confidential to the Vendor and CCO may provide answers to such questions to all Vendors who have indicated their intention to submit a Response. It is the Vendor's responsibility to communicate with the Bid Administrator concerning any discrepancies, omissions or additional information required. CCO shall not be responsible for any misunderstanding on the part of any Vendor concerning this Invitational Tender, its conditions or the process. Further, no claim after submission of a Response that there was any misunderstanding with respect to the conditions imposed by the Invitational Tender will be considered justifiable.

4. Evaluation

4.1 Evaluation Process

CCO will evaluate the written responses in accordance with the following stages and steps:

Step 1:

The Response will be reviewed to determine whether it substantially complies with the requirements and information requests contained in the Invitational Tender and that all forms are completed as instructed. A Vendor's failure to provide a substantially complete Response may result in the Response not being evaluated.

Step 2:

The evaluation team will evaluate each Response in accordance with Section 4.2.

Step 3:

The evaluation team will select the top ranking Vendor(s) to proceed to the Vendor Interview Stage (if required) or Contract Stage as applicable.

4.2 Evaluation Criteria Weightings

An evaluation committee will evaluate Vendors' Invitational Tender Responses according to the following evaluation criteria and weighting. Vendors are responsible for reviewing the criteria and providing appropriate and sufficient information in the Response.

Stage 1:

<i>Criteria</i>	<i>Weighting</i>
A. Vendor Submission – Based on Response to Questions in Appendix B	35
Total Score	35

Only vendors that obtain a minimum score of 26/35 (~74%) or higher during stage one of the evaluation will move on to the second stage.

Stage 2:

<i>Criteria</i>	<i>Weighting</i>
B. Presentation	50
C. Pricing	15
Total Score	65
Combined Score (Stage 1&2)	100

4.3 Clarification of Response

During the Response evaluation, CCO may request that any Vendor provide further clarification to any part of its Response. The evaluation of a Response will include any clarifications provided in writing in response to questions posed by CCO as well as any other investigations made by CCO. CCO will have the right to verify any information received, including any references, and, for that purpose, the Vendors shall be deemed to consent to and authorize the release of such information to CCO. If required, it may be necessary for a Vendor to attend one or more clarification meetings with CCO.

CCO is under no obligation to request clarification with respect to, or verify, any information in any Response, including the clarification or verification of an ambiguity in the Response. CCO may, in their discretion, request clarification with respect to, or verify, matters related to none, one or some of the Response.

5. Invitational Tender Terms and Conditions

5.1 No Publicity or Promotion

Except with the prior written consent of CCO, Vendors shall not make any public announcement or distribute any literature regarding: (i) this Invitational Tender, (ii) any discussions relating to this Invitational Tender, (iii) any award or other results relating to this Invitational Tender, or (iv) otherwise promote itself in connection with this Invitational Tender.

5.2 Confidentiality/ FIPPA/PHIPA

Information contained in this Request for Proposal or information obtained by a Respondent in further discussions with CCO, either in writing, orally or through observation, is confidential and must not be disclosed or used by a Respondent except as authorized in this Request for Proposal or by CCO in writing. If any portion of a Respondent's Response is to be held confidential, such provisions must be identified in the Response.

Effective January 1, 2010, CCO is designated as an "institution" within the meaning of the *Freedom of Information and Protection of Privacy Act* ("FIPPA") and as a result, all persons may have a legal right of access to information in the custody and/or control of CCO, subject to a limited set of exemptions.

Respondents are strongly advised to consult their own legal advisors as to the appropriate way in which confidential or proprietary business information contained in their Response should be marked. CCO shall not be liable in any way whatsoever if such information is disclosed in response to a FIPPA access request or based on an order or decision of the Information and Privacy Commissioner or otherwise as required under the applicable law.

The *Personal Health Information Protection Act, 2004* (Ontario) ("PHIPA") establishes the rules for the collection, use, and disclosure of personal health information. PHIPA applies to health information custodians and their agents and Cancer Care Ontario, which is designated both as a "prescribed entity" and as a "prescribed registry". Respondents are expected to be knowledgeable about relevant privacy requirements and to provide their services accordingly."

5.3 Additional Information

CCO may request additional information from Vendors and any costs associated with any responses to such requests will be the responsibility of the Vendor.

5.4 No Binding Obligations

This Invitational Tender shall not by its issuance, or as a result of any Response, in any way restrict CCO's rights or create or imply any legal obligations or commitments on the part of CCO to enter into a contract or agreement of any kind in respect of any or all of the contents of this Invitational Tender. CCO hereby expressly disclaims any such obligations or commitments. This Invitational Tender does not oblige CCO to pay for any costs of any kind whatsoever that may be incurred by a Vendor or any associated third parties in connection with their Response, the preparation thereof or in respect of any subsequent negotiations. Without limiting the generality of the foregoing, CCO also expressly reserves the rights as set forth in Section 6.6.

5.5 Not a Tender Call

To be clear, and notwithstanding any other term of this Invitational Tender that may be interpreted otherwise, it is not the intent of CCO, nor the effect of this Invitational Tender, to initiate contractual relations by the provision of a Response by any Vendor in response to this Invitational Tender.

Notwithstanding any other term of this Invitational Tender, this Invitational Tender is merely a call for Proposals and not a tender call intending to place legally binding obligations on CCO or on any Vendor to enter into a Services Agreement or to be bound by any of the terms of a Response.

It is conceivable that no agreement will be concluded due to the discretion of CCO and/or any Vendor to not proceed, as there is no legally binding obligation on CCO or Vendor to proceed.

CCO may provide the Vendor with an opportunity to attend a debriefing session. The availability and conduct of the debriefing session is subject to CCO's debriefing policies.

The Vendor shall not hold CCO liable for any error or omission in any part of this Invitational Tender. CCO does not guarantee or warrant that the information contained in this Invitational Tender is accurate, comprehensive or exhaustive.

5.6 Reserved Rights of CCO

CCO reserves the right to:

- (a) make public the names of any or all Vendors;
- (b) request written clarification or the submission of supplementary written information in relation to the clarification request from any Vendor and incorporate a Vendor's response to that request for clarification into the Vendor's Response;
- (c) adjust a Vendor's scoring or reject a Vendor's Response on the basis of
 - (i) a financial analysis determining the actual cost of the Response when considering factors including quality, service, price and transition costs arising from the replacement of existing goods, services, practices, methodologies and infrastructure (howsoever originally established);
 - (ii) information provided by client references;
 - (iii) the Vendor's past performance on previous contracts awarded by CCO;
 - (iv) the information provided by a Vendor pursuant to CCO exercising its clarification rights under this Invitational Tender process; or
 - (v) other relevant information that arises during this Invitational Tender process;
- (d) waive formalities and accept Responses which substantially comply with the requirements of this Invitational Tender;
- (e) verify with any Vendor or with a third party any information set out in a Response;
- (f) check references other than those provided by any Vendor;
- (g) disqualify any Vendor whose Response contains misrepresentations or any other inaccurate or misleading information;
- (h) disqualify any Vendor where there is any evidence that the Vendor, its employees, agents, contractors or representatives colluded with one or more other Vendors or any of its or their respective employees, agents, contractors or representatives in the preparation of the Response;
- i. if the Vendor, its employees, agents, contractors or representatives contacts or attempts to contact, during the Invitational Tender process, for the purpose of obtaining information that relates to this Invitational Tender :
 - a. any agent or representative of CCO (other than the Bid Administrator);
 - b. any members of the evaluation team;
 - c. any expert or other advisor assisting the evaluation team;
 - d. any staff or employee of CCO, including the MOHLTC and the Minister's Office and staff (excluding the Bid Administrator);
 - e. any staff of the Premier's Office or Cabinet Office; or
 - f. any members of Cabinet or their staff;
- ii. where the Vendor has been convicted of any offence;

- iii. where the Vendor, in CCO's sole opinion, is in a conflict of interest;
 - iv. where there is evidence, satisfactory to CCO, of fraud, bribery, improper behaviour, misrepresentation, faulty submission or failure to comply with any law including any law protecting individuals against any manner of discrimination with respect to the Vendor, any of its employees or any sub-contractor included as part of its Response; or
 - v. where CCO determines that the Vendor's performance on other contracts, including the efficiency and workmanship as well as the extent to which the Vendor executed the work in accordance with contractual terms and conditions, is sufficiently poor to jeopardize the selected completion of CCO's requirements;
- (i) amend or revise the Invitational Tender in writing at any time. All Vendors shall be informed by CCO of any such change by numbered addenda. However, CCO reserves the right to provide oral interpretations to any Vendor and these oral interpretations shall not affect or modify the Invitational Tender. If in CCO's sole opinion such oral interpretations do not necessitate the issuance of a written addendum, such oral interpretations need not be provided to all Vendors in the form of written addenda or otherwise;
 - (j) select any Vendor other than the Vendor whose Response reflects the lowest cost to the CCO or the highest overall score;
 - (k) cancel this Invitational Tender process at any stage;
 - (l) cancel this Invitational Tender process at any stage and issue a new Invitational Tender for the same or similar goods and services;
 - (m) accept any Response in whole or in part;
 - (n) discuss with any Vendor different or additional terms to those contemplated in this Invitational Tender or in any Vendor's Response;
 - (o) if a single Response is received, reject the Response of the sole Vendor and cancel this Invitational Tender process or enter into direct negotiations with the sole Vendor;
 - (p) reject any or all Responses in its absolute discretion;
 - (q) negotiate in respect of any term or condition proposed by Vendor in its Response, whether a business or legal term or condition or otherwise; and

These reserved rights are in addition to any other express rights or any other rights which may be implied in the circumstances and CCO and its respective representatives shall not be liable for any expenses, costs, losses or any direct or indirect damages incurred or suffered by any Vendor or any third party resulting from CCO exercising any of its express or implied rights under this Invitational Tender.

By submitting its Response, the Vendor authorizes the collection by CCO and its representatives of the information requested in this Invitational Tender in the manner contemplated therein.

Appendices follow

Appendix A: Vendor Acknowledgement and Offer Form

Invitational Tender #: 2013-47

Invitational Tender Name: Facilitated Processes & Effective Communication Trainer

Vendor's full legal name and mailing address:

Vendor's representative's full name, telephone, and facsimile numbers:

The Vendor hereby represents, agrees, declares and/or acknowledges that:

- (a) Information contained in the Invitational Tender or information obtained by a Vendor in further discussions with CCO, either in writing, orally or through observation, is confidential to CCO and must not be disclosed or used by a Vendor except as authorized in this Invitational Tender or by CCO in writing;
- (b) Except with the prior written consent of CCO, Vendor shall not make any public announcement or distribute any literature regarding: (i) this Invitational Tender (ii) any discussions relating to this Invitational Tender, (iii) any award or other results relating to this Invitational Tender or (iv) otherwise promote itself in connection with this Invitational Tender .
- (c) The information it is providing is, to the best of its knowledge, complete, accurate and up-to-date;
- (d) it consents to the disclosure of its information, including any information identified as confidential by it, by CCO to any of CCO's consultants or advisors who may be retained for the purposes of evaluating the information, as well as CCO's employees, directors and officers, who need to know in relation to the Invitational Tender and the procurement of the services;
- (e) the Vendor has identified any information in its submission for which confidentiality is to be maintained by CCO;
- (f) the Invitational Tender and this Response do not create any legal obligation on the part of CCO or restrict CCO's rights regarding the procurement of any good or service;
- (g) it consents to CCO performing checks with any references provided and with any other relevant references;
- (h) it is not in a position of a conflict of interest in respect to responding to the Invitational Tender and providing the Response or, if awarded the work, entering into an agreement with CCO, performing the services and providing the deliverables.

[Insert Name of Vendor]

per: _____

Signature of Authorized Representative

Name:

Title:

Date:

Telephone:

I have authority to represent and bind the Vendor

Appendix B: Vendor Knowledge & Experience [35 points]

Instructions to Vendors	
The following questions relate to the Vendor's Knowledge & Experience, please ensure that your response clearly identifies the question & question number being addressed.	
No.	Details
1.	<p>Please describe your knowledge and experience managing facilitated processes and supporting effective communication with an emphasis on the development and delivery of training programs for adult learners on this topic. The response should include relevant experience related to facilitating group processes to achieve a specific goal or consensus on a complex issue. Weight [15 Points]</p> <p>Information should also be provided to show how you have:</p> <ul style="list-style-type: none"> • incorporated adult learning principles into their trainings and facilitated sessions • built the skill level of participants to facilitate complex processes • used techniques to promote the transfer of knowledge and skill to participants • altered their approach to adapt to the participants' needs and context
2.	<p>Please provide an outline of the proposed training program and methodology to be used for each target audience (a) PTCC staff and b) Public Health unit staff. Also explain how the training program will be made practical and relevant to each target audience taking into consideration their needs and work context. The specific techniques to transfer knowledge and skills should also be described. Weight [10 Points]</p>
3.	<p>Please provide a total of 3 references relevant to the services required that can confirm your experience in the development and delivery of training programs related to facilitation and effective communication. REQUIRED</p>
4.	<p>Please provide 3 writing samples of materials developed for training workshops. Weight [10 Points]</p>

Appendix C: Pricing Response [Score Weight 15 pts.]

CCO requires full transparency in relation to all costs involved in delivery of the Services.

General Assumptions

- Vendors shall provide a Maximum Flat Fee proposal for the assignment. This rate shall be all inclusive of the services requested except for valid expenses which must be pre-approved and be consistent with **CCO’s Travel & Expense Policy** revised May 5, 2010.
- CCO will directly reimburse travel expenses for candidates that visit CCO for interview meetings, from outside the greater Toronto area. (if required)
- Any variables or additional services deemed as value ads by the vendor shall be clearly described along with their underlying assumption for inclusion in the vendor’s response as an optional service.
- All administrative services and supplies used by the Supplier to complete the Services will be provided to the Client at no additional charge.
- **CCO expects a performance based fee structure where a portion of the flat fee is paid at key milestones in the process.**

Instructions to Bidders

- Vendors must provide a Pricing Response in this Invitational Tender by using the table provided below.
- CCO will evaluate Vendor’s Pricing Response based on a pricing formula that takes into consideration the "average" Maximum Flat Fee across all submissions received.
- A Pricing Response that is 20% or more greater than the average may receive a score of 0. Conversely, any Pricing Response that is 20% or more lower than the average rate, may receive the full score.

Please provide pricing for the following three (3) options:

Option 1: Services as Described in Section 1.3.2 – One Workshop

Pricing Response		
#	Item Description	Amount (in CAD Funds)
1	Service Fee – Flat fee for the services requested	\$
2	Estimated Expenses	\$
3	Taxes Estimated @ 13% HST	\$
	Total	\$

Option 2: Services as Described in Section 1.3.2 – Two Workshops

Pricing Response		
#	Item Description	Amount (in CAD Funds)
1	Service Fee – Flat fee for the services requested	\$
2	Estimated Expenses	\$
3	Taxes Estimated @ 13% HST	\$
Total		\$

Option 3: Services as Described in Section 1.3.2 – Three Workshops

Pricing Response		
#	Item Description	Amount (in CAD Funds)
1	Service Fee – Flat fee for the services requested	\$
2	Estimated Expenses	\$
3	Taxes Estimated @ 13% HST	\$
Total		\$

Appendix D: Tax Compliance Declaration

Ministry Tax Compliance

The Ontario Government expects all suppliers to pay their provincial taxes on a timely basis. In this regard, Vendors are advised that any contract with the Ontario Government will require a declaration from the successful Vendor that the Vendor's provincial taxes are in good standing.

In order to be considered for a contract award, the Vendor must submit the following tax compliance status statement and the following consent to disclosure:

Declaration

I/WE hereby certify that _____ at the time of submitting its Response,

(legal name of Vendor)

is in full compliance with all tax statutes administered by the Ministry of Revenue for Ontario and that, in particular, all returns required to be filed under all provincial tax statutes have been filed and all taxes due and payable under those statutes have been paid or satisfactory arrangements for their payment have been made and maintained.

Consent to Disclosure

I/We consent to the Ministry of Revenue releasing the taxpayer information described in this Declaration to the Ministry issuing the RFP as necessary for the purpose of verifying that I/we am/are in full compliance with all statutes administered by the Ministry of Revenue.

Dated at _____ this _____ day of _____ 20_____

(An authorized signing officer)

(Print Name)

(Title)

(Phone Number) (Fax Number)

Appendix E: References

Reference Checks

Vendors are required to provide three (3) client references that can verify the Vendor's ability to perform within a similar scope of services. The client references shall contain as a minimum, the names, titles, and contact information for clients to whom the Vendor has provided services in a similar mandate as required by CCO.

Client Reference 1

Company name: _____
Contact name: _____
Title of contact: _____
Phone number: _____
Fax number: _____
Email: _____
Role (& Name) Placed: _____

Client Reference 2

Company name: _____
Contact name: _____
Title of contact: _____
Phone number: _____
Fax number: _____
Email: _____
Role (& Name) Placed: _____

Client Reference 3

Company name: _____
Contact name: _____
Title of contact: _____
Phone number: _____
Fax number: _____
Email: _____
Role (& Name) Placed: _____