



**Application Guidelines**

**Request for Quotations (RFQ)**

**To Provide Brand Strategy to the Toronto Autism Services Network**

**Issued: Monday, July 18, 2022**

**Application Deadline: Friday, August 5, 2022  
5:00p.m. EST**

**Please submit proposals to:**  
**Eric Chen**  
**Procurement Officer**  
**Surrey Place**  
**2 Surrey Place**  
**Toronto ON M5S 2C2**  
[eric.chen@surreyplace.ca](mailto:eric.chen@surreyplace.ca)

**Table of Contents**

1. Background	Page 3
2. Scope of Services	Page 4
3. Form of Proposal	Page 4
4. Evaluation Criteria	Page 5
5. Terms and Conditions	Pages 5-8
6. Key Dates and Contact Information	Page 8

## 1. Background

Surrey Place is issuing a Request for quotations (RFQ) on behalf of the Toronto Services Autism Network ([www.torontoautismservices.ca](http://www.torontoautismservices.ca)) to select a firm to create a brand strategy, and communications plan to support the strategic partnership.

This RFQ has been initiated as a standard procurement procedure to meet the requirements of the Broader Public-Sector Accountability Act, 2010 and its associated Procurement Directive, 2011 and in accordance with Surrey Place's [procurement policy](#).

### About Surrey Place

Surrey Place is a not-for-profit organization that serves people of all ages with developmental disabilities, autism spectrum disorder and visual impairments in the Toronto region and Northwestern Ontario. As a trusted leader in the developmental services sector, the organization provides integrated services and inclusive support in a safe and welcoming environment. Surrey Place helps people learn new skills, gain self-confidence and reach their full potential.

The Surrey Place team consists of caring clinicians, staff, valued partners and other experts in the sector. Together, they create responsive and innovative care plans that meet client's needs. Their approach is family-based, which centres the interests and care of clients, families and caregivers by teaching them skills. Surrey Place strives to ensure the greatest access to services and support clients in navigating the health care system.

For 60 years, Surrey Place has supported people with varying and complex needs to connect with their communities and achieve their goals. Surrey Place is accredited by Accreditation Canada through the healthcare program.

### About Toronto Autism Services Network

The Toronto Autism Services Network is a group of seven agencies – Geneva Centre for Autism, Holland Bloorview Kids Rehabilitation Hospital, Kerry's Place Autism Services, Lumenus Community Services, SAAAC Autism Centre, Strides Toronto and Surrey Place – with decades of experience providing high-quality services to children with autism spectrum disorder (ASD) and their families. With a shared vision of support, the network offers a single access point for families to receive consistent service provision and high-quality family-centred autism services.

The group of agencies form an integrated and equitable system of care for families and children diagnosed with ASD. We offer intervention services and family and caregiver training through our Social ABCs, Pivotal Response Treatment and Project ImPACT programming. The services are monitored and evaluated to respond to changing evidence and practices. These supports are also coordinated with concurrent clinical services, including speech-language pathology, occupational therapy, medical consultation, childcare, mental health supports and respite services. This inter-

professional collaboration results in a comprehensive, wraparound support team that can make informed decisions to meet your family's individual needs.

## 2. Scope of Services

Services required from the successful firm include:

- Conduct a discovery session with each of the seven partner agencies to identify the contributing brand pillars and unique value propositions for the larger Toronto Autism Services Network brand.
- Conduct discovery workshops with the executive team (includes representation of each agency) and other relevant stakeholders
- Develop clear brand pillars with relevant KPIs.
- Clearly define the purpose of the network and shared values.
- Identify the emotional benefits and the tangible benefits of the brand.
- Develop a core brand message as well as a set of supportive messages for different channels, including website, email and social media.
- Create visual brand guidelines.
- Create and execute a brand re-launch for both internal and external stakeholders.
- Develop creative assets for brand re-launch, including but not limited to website banners, email marketing, and social media graphics.

## 3. Form of Proposals

All proposals are required to include:

- **An overview of your agency;** including year agency was established, the number of current employees, any professional qualifications or awards, and a list of the employees/roles within your agency that would support this project.
- **An overview of your services;** including specific areas of expertise and potential relevance to Surrey Place.
- **A client overview;** including a list of your agency's top five clients (by revenue), percentage of total revenue and tenure with agency.
- **A brief description of similar projects** previously undertaken that may be of relevance, including projects for not-for-profit clients entering into a fee-for-service environment.
- **A 150-word explanation of why your agency is a good fit** for Surrey Place.
- **One case study** (maximum 1000 words) to demonstrate your strategic approach, campaign development and execution capabilities.
- **References** from at least three (3) current, comparable clients of similar size and scope of Surrey Place, where possible. (Surrey Place will not contact references without your agency's written approval).

#### 4. Evaluation Criteria

Proposals will be evaluated based upon the following criteria:

	Evaluation Domain	Weight
1	• Professional overview experience	30%
2	• Case study	30%
3	• Degree of fit between both organizations and knowledge and/or relevant or transferable experience of the sector	30%
4	• Overall quality of the proposal	5%
5	• Quality of references	5%

Please note that:

- The estimated budget is \$80,000-90,000 (including tax) and must include all fees, including media costs, agency fees, production and execution costs and applicable taxes. The final budget and scope will be negotiated with the successful agency.
- Submissions that do not meet the evaluation criteria will be disqualified.
- In order to be fair to all applicants, late submissions and phone calls or emails to discuss the status of the application will not be accepted.
- Only short-listed applicants will be contacted for an interview/presentation.

#### 5. Terms and Conditions

##### Delivery of Proposal

Sealed envelopes containing two (2) hard copies of your proposal must be received at the address noted below

Please submit  
proposals to:

**Eric Chen**  
**Procurement Officer**  
**Surrey Place**  
**2 Surrey Place**  
**Toronto ON M5S 2C2**  
[eric.chen@surreyplace.ca](mailto:eric.chen@surreyplace.ca)

Application Deadline: Friday, August 5, 2022, 5:00 p.m. EST.

Please also note that it is mandatory to submit one (1) electronic copy to:  
[eric.chen@surreyplace.ca](mailto:eric.chen@surreyplace.ca)

##### Proposal Time Limit

Each bidding firm shall commit that the proposal is valid and accurate for 120 days from the closing date Friday, August 5, 2022.

##### Selection Process

Surrey Place reserves the right to accept or reject any proposals. Surrey Place will review all applications. The award will be based on a review of the proposals against all evaluation criteria and will not necessarily be awarded based on the lowest price offered. Each firm will be provided with fair access to information, as requested by e-mail or in writing (see Key Dates). Additional written materials, to ascertain the qualification of applicant may be requested.

### **Inquiries**

Applicants should e-mail (please do not telephone) all questions to:  
[eric.chen@surreyplace.ca](mailto:eric.chen@surreyplace.ca)

### **Liability Insurance**

All firms are requested to warrant that the firm does not currently have any outstanding liability claims that may impact on the future health of the firm. Additionally, the firm must maintain sufficient liability insurance relevant for a client of our size. The liability coverage must be confirmed.

### **Conflict of Interest**

Applicants responding to this RFQ may not have any personal or business interest that would present an actual, potential or apparent conflict of interest with the performance of the contract to be awarded.

### **Distribution of the Invitation for Proposals**

This invitation has been released:

- By publication on Surrey Place Centre's website and MERX.COM
- By invitation

### **Surrey Place is not Committed to Applicant's Expenses**

The application process will not necessarily result in a commitment to sign a contract with the applicant. Surrey Place shall not be liable for any expenses incurred by any applicant, including the expenses associated with the cost of preparing the Application.

### **Expense claim and reimbursement rules**

Surrey Place will not pay or reimburse an applicant for any hospitality, incidental or food expenses, including but not limited to expenses in respect of meals, snacks, beverages, gratuities, laundry or dry cleaning, valet services, dependent care, home management

and personal telephone calls. Reimbursement for allowable expenses can be claimed and reimbursed only when the contract specifically provides for it.

## **External Factors**

Surrey Place reserves the right to withdraw this RFQ or terminate the resulting contract within the terms of the contract without penalty.

## **Bid dispute resolution process and procedure**

Unsuccessful applicants can request a debriefing within 60 calendar days following the date of the contract award notification. The request should be submitted to Procurement Officer. The Procurement Officer will respond to the vendor and arrange an applicant debriefing with 10 business days of receiving the request.

When conducting vendor debriefings, Surrey Place will:

- Confirm with each applicant the date, time and location of the debriefing session in writing,
- Conduct separate debriefings with each applicant,
- Not disclose information concerning other applicants, other than the names and addresses of applicants who participated in the competitive process
- Not answer questions unrelated to the competitive process,
- Provide a general overview of the evaluation process set out in the procurement document,
- Discuss strengths and weaknesses of an applicant's submission in relation to the specific evaluation criteria,
- Provide suggestions on how the applicant may improve future submissions,
- Address questions and issues raised by the applicant in relation to their submission.
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Subsequent the applicant debriefing, if an applicant wishes to dispute the outcome of the procurement process, the aggrieved party is to file the bid protest in writing, with Vice President, Finance and Corporate Services, by registered mail, within 10 business days of the debriefing meeting. A protest in writing shall include the following:

- The name and address of the complainant,
- Identification of the contract or bid solicitation being protested,
- The date of debriefing and name of procurement officer who conducted the debriefing,
- Detailed and factual statement of the grounds for protest,
- The complainant's arguments and supporting documentation, and
- The complainant's requested remedy.

The Vice President, Finance and Corporate Services will respond, in writing, to the Complainant within 10 business days of receiving the protest. The final decision on the issue will come from the Vice President, Finance and Corporate Services, in consultation with the Chief Executive Officer and shall be considered final and conclusive.

## Information disclosure

Any confidential information supplied to Surrey Place may be disclosed by Surrey Place where it is obliged to do so under the Freedom of Information and Protection of Privacy Act (FIPPA), by an order of a court or tribunal or otherwise required at law.

## 6. Key Dates and Contact Information

<b>RFQ issue date</b>	Monday, July 18, 2022
<b>Bidder's questions deadline</b>	Friday, July 29, 2022, 5:00p.m. EST
<b>Deadline for proposals</b>	Friday, August 5, 2022 5:00p.m. EST

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