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| **REQUEST FOR PROPOSALS (RFP)****for the Provision of** **Housing Supports to TCHC Rooming House Tenants** |

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| **Appendix 1: Proposal Guidelines** |

**DEADLINE FOR SUBMISSIONS:**

**12pm Noon TUESDAY MARCH 13, 2018**

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# KEY INFORMATION

## 1.1 Purpose of RFP

The intent of this Request for Proposals (RFP) is to award funding to a housing support provider to provide, co-ordinate and oversee the delivery of support services to new and current tenants of 204 units located in 22 TCHC rooming houses. The Proponent may either directly deliver supports, or partner with experienced housing support providers to deliver support services that are flexible and personalized to the needs of each tenant. The aim is to promote housing stability and improved quality of life for people exiting, or at risk of, homelessness.

TCHC will continue to operate these units and thus it is crucial that housing support providers are able to work closely and collaboratively with TCHC as partners in housing stability. The support provider will be responsible to communicate regularly with TCHC staff.

Housing support provider or partners will be required to:

* conduct a community assessment;
* create a plan to engage with current tenants;
* create a plan to engage with residential and business neighbours;
* work with individual tenants to increase housing stability;
* create a Community Action Plan, working with tenants to identify community needs and a plan to address the most pressing issues;
* manage vacancies through direct referrals from City Shelters through SSHA's Coordinated Access to Housing Supports Program;
* collaborate with other support agencies and City divisions;
* meet reporting requirements as determined by the City; and
* work closely with TCHC and the City on a collaborative approach to program delivery.

The program is funded through the provincial Home for Good program for housing with supports, targeted at contributing to the provincial goal of ending chronic homelessness by 2025. Funding will be administered by Shelter, Support, and Housing Administration.

Portfolio Overview

* 22 houses
* 204 units (rooms)
* 21 located in Ward 28
* One located in Ward 20
* Total unoccupied units (as of January 23, 2018) is 40

Current Tenant Overview

* Average income is less than $10,000
* 85% identify as male

*Proposals accepted through the RFP will:*

* **Introduce new supports** to new and current tenants in TCHC rooming houses;
* Work with new tenants who meet at least **one of the four Provincial target group** criteria:
1. **People experiencing chronic homelessness** (people who have been homeless for 6+ months);
2. **Indigenous people experiencing homelessness** (First Nations, Métis, and Inuit);
3. **Youth experiencing homelessness** (aged 16-24, and not accompanied by an adult or guardian); and,
4. **Homelessness following transitions from provincially-funded institutions and service systems** (e.g., hospitals and prisons).

## 1.2 Important Dates

## Information Session:

Potential Proponents are strongly encouraged to attend an information session.

Agencies should send a maximum of 2 people. Preferably one of these people will be responsible for writing the RFP. To register email tenantsfirst@toronto.ca.

 **Information Session details:**

 **Wednesday February 21, 2018, 8:30 – 10:30 am**

 **City Hall, Committee Room 2**

**Questions and Addenda**

Please direct any specific questions regarding this RFP in writing to tenantsfirst@toronto.ca . To ensure all Proponents have access to the same information, **questions may only be submitted in writing**.

All RFP revisions, clarifications made at the information session and any answers to submitted questions will be communicated electronically as an addendum which will be released March 6, 2018

 **Deadline for Written Questions: February 27, 2018**

 **Release of Addendum: March 6, 2018**

**Submissions Due - March 13, 2018 by 12pm noon**

## 1.3 Total Available Funding and Funding Term

Up to $1,500,000 annually is available for an agency to assess, co-ordinate and deliver support services, to provide housing supports to TCHC rooming house tenants. The target commencement date for funding is May 1, 2018. Agreements will extend until April 30, 2020.

## 1.4 Submission Instructions

Submissions must follow **all** of the following instructions:

* be e-mailed in its entirety to tenantsfirst@toronto.ca by the March 13, 2018 by noon with the subject line: AGENCY NAME- TCHC rooming house support RFP
* The full application must include:
* A completed Application
* Schedule A: Work plan
* Schedule B: Project Budget
* Part A (if applicable): Organizational Overview
* A signed Board Resolution (if available, must be submitted once board have met)
* be **delivered** to address indicated below and submitted electronically by the stated deadline:

 Freida Cordoba

 City Hall

 Social Development, Finance and Administration

 100 Queen Street West

 14 Floor East Tower

 Toronto, Ontario M5H 2N2

* include five **(5)** hard copies of your proposal
* be in a sealed envelope marked with Proponent’s name and phone number
* be complete and legible
* address all requirements outlined in the guidelines

## 1.5 Contact

Please direct any questions in writing to tenantsfirst@toronto.ca.

# BACKGROUND

Shelter, Support & Housing Administration (SSHA) delivers housing and homelessness services in partnership with community agencies by providing funding and coordinating services. These services are aimed at preventing and ending homelessness through a range of initiatives, partnerships and supports that help people to access emergency shelter and to find and keep housing. This RFP has been issued in conjunction with the Tenants First Project Management Office in Social Development, Finance and Administration (SDFA).

The Tenants First Project Office is responsible for the implementation of the Tenants First Plan to transform TCHC. This includes improving service to tenants and creating a sustainable financial and service model for TCHC. Adding supports to TCHC rooming house tenants is the first step in the eventual transfer of these properties to the non-profit sector.

In September 2017, the City of Toronto was allocated funding from the Provincial *Home for Good (HFG) Program*. The funding aims to increase the availability of housing with supports and contribute to the goal of ending chronic homelessness by 2025. The HFG funding program recognizes housing with supports as a key component to assisting people living with complex physical and mental health challenges to achieve and maintain housing stability.

HFG operating funding is directed towards providing housing subsidies and support services to people who fall within the provincial priority areas – chronic homelessness, youth homelessness, Indigenous homelessness, and homelessness following transition from provincial institutions and service systems.

The City of Toronto's HFG Program will create housing opportunities with flexible and individualized supports for people experiencing, and at risk of, homelessness. By adopting a Housing First, Harm Reduction, and Eviction Prevention approach, tenants will be supported to achieve and maintain housing stability, thus promoting overall wellbeing, improved quality of life, and increased community connections.

## Divisional Directives

The [*Housing Stability Service Plan*](http://www.toronto.ca/legdocs/mmis/2013/cd/bgrd/backgroundfile-64006.pdf) (HSSP) was approved by Toronto City Council in December 2013 and guides the planning, management and delivery of housing and homelessness services that enables vulnerable residents to access suitable housing, remain in their homes longer and improve their well-being through a range of supports.

Supportingthe transition to housing (*Strategic Direction 2)* is a key commitment in the Service Plan, including, ensuring every client has an individualized service plan in place and adequate supports that will enable and facilitate a move out of the shelter or off the street and into housing (Key Action 2.2).

The Program also meets other priorities of the HSSP, including:

* Fostering system stewardship and innovation *(Strategic Direction 4)* by providing an opportunity for community agencies to leverage effective Housing with Supports
* Improving access and equity (*Strategic Direction 5)* by ensuring that Housing with Supports are appropriate and responsive to the needs of individuals experiencing long-term homelessness
* Delivering high quality service (*Strategic Direction 6)* by providing customer service that is respectful, considerate and responsive to the needs of vulnerable individuals
* Partnership development and service coordination *(Strategic Direction 7)* by continuing to strengthen SSHA's relationship with community agencies to ensure the Division is responsive to the needs of people experiencing long-term homelessness

**Tenants First Project**

The overall focus of Tenants First is to implement a plan in which Toronto Community Housing focuses on being a social housing landlord, where buildings are in a good state of repair, and tenants are connected to appropriate services and active participants in their communities.

Phase 1 of the Tenants First Implementation Plan was unanimously approved by Council in July 2017.

In January 2018, Council approved the beginning steps to transfer TCHC's scattered portfolio to the non-profit sector. The funding and oversight of supports to rooming houses tenants is the first step to a transfer of these properties to the non-profit sector.

## Adopting a Housing First Approach

As identified in the HSSP, SSHA seeks "to transform services for those experiencing homelessness from strictly temporary solutions to those focused on supporting a transition to permanent, stable housing".

In a Housing First approach, access to housing is not dependent on 'readiness' or on the person accepting treatment for any physical health, mental health or substance use issues, although those supports are offered. Research has shown that someone is more likely to have success in overcoming these challenges once they have access to permanent, stable housing.

A Housing First approach can be applied at multiple levels across the service system, as:

1. a **philosophy** and set of core principles underlying the work of all programs and service areas
2. a **system approach** whichguides planning, coordination and delivery across the service system
3. specific operational **program models** for service delivery.

Each program and sector has a role to play in operationalizing a Housing First approach. Having a range of housing and support types available to meet the varied needs and choices of clients is important to a successful Housing First service system. Housing First is an outcomes-focussed approach that works in a variety of different housing types, from scattered site housing in the private rental market to dedicated permanent supportive housing.

The roles of different programs and sectors will vary, but each is part of a larger outcomes-focussed housing stability service system that works collectively towards shared goals. The Housing First approach and core principles outlined here are the foundation for all services and programs to address homelessness and housing stability in the City of Toronto.

SSHA funds Housing with Supports Programs with the goal of creating housing stability for people who have experienced homelessness. Programs should be guided by the Five Core Housing First Principles:

* Direct access to permanent housing as quickly as possible, with the supports needed to maintain it
* No housing readiness requirements or programmatic preconditions to accessing housing services
* Clients are offered choice in both housing options and supports provided
* Individualized, client-centred supports are strengths-based, trauma informed, grounded in a harm reduction philosophy and promotes self-sufficiency
* Social and community integration is encouraged through opportunities for participation in meaningful activities

## Adopting a Harm Reduction Approach

SSHA defines harm reduction as an approach, set of strategies, policy or program designed to reduce substance-related harm. Harm reduction strategies are person-driven, flexible in design and ensure that people who use substances are treated with dignity and respect, and as full members of society. This definition is consistent with SSHA’s overarching Housing First approach to services. Using a Harm Reduction approach when delivering services to individuals who have experienced homelessness can improve the likelihood that they achieve housing stability.

Although harm reduction can be seen as being at odds with abstinence, it is in fact part of the harm reduction continuum. While harm reduction includes services such as needle and syringe programs, managed alcohol programs and supervised injection services, it also encompasses a range of approaches, interventions and programs based on specific population needs.

Examples of harm reduction approaches in housing programs that do not directly offer harm reduction services (i.e. managed alcohol programs, needle exchange programs etc.) may include:

* sharing information about harm reduction programs and services with clients
* conducting referrals to off-site harm reduction programs and services
* providing clients with non-judgmental support if they want to talk about their use
* developing a safety plan with clients about their use
* having overdose prevention and response policies in place so staff know what to do if a person in their program overdoses

Examples of harm reduction approaches in abstinence housing programs may include:

* using non-judgmental verbal and body language when talking about substance use
* conducting warm referrals to other housing programs if a client starts using substances
* having overdose prevention policies in place so that staff know what to do if a person in an abstinence program overdoses

You can read more about SSHA's understanding of harm reduction in the division’s [Harm Reduction Framework](https://www1.toronto.ca/City%20Of%20Toronto/Shelter%20Support%20%26%20Housing%20Administration/Article/Statistics%2C%20Research%20%26%20Reports/SSHA%20Harm%20Reduction%20Framework.pdf).

# FUNDING OBJECTIVES AND SCOPE OF WORK

## Application purpose

The purpose of this Request for Proposals (RFP) is to:

* Award provincial Home for Good funding, until March 31 2020;
* Ensure tenants of TCHC rooming house properties are provided with sufficient support to maintain housing;
* Support the provincial goal of ending chronic homelessness;
* Increase the availability of housing with supports available to households exiting or at risk of homelessness;
* Promote the provision of supports that appropriately meet the needs of households exiting or at risk of homelessness;
* Promote housing stability for households exiting or at risk of homelessness; and
* Improve physical and mental health outcomes, quality of life, social connectedness, individual and community resiliency, and equitable access to services for households exiting or at risk of homelessness.

## Scope of Work and Criteria for Selection

The intent of this (RFP) is to award funding to housing providers to deliver housing support services to current and future TCHC rooming house tenants under the following conditions, a) to c).

The proponent may wish to provide support directly to tenants, however the development of partnerships with experienced support service providers who work with the tenants and liaise with the coordinating agencies and TCHC to promote housing stability is encouraged. Refer to Section 8 of the Proposal Guidelines for more information on the development of formal partnerships.

It is assumed the proposed project will provide service until March 2020, with the possibility of extension dependent on provincial funding.

1. **Each proposal must demonstrate that the supports offered will:**
* Be individualizedfor each tenant, with culturally-specific supports offered to Indigenous tenants, and age-specific and developmentally-appropriate supports offered to Youth tenants;
* Be community-focused with a plan to engage with the greater community;
* Be flexibleandresponsive;
* Be client-driven;
* Follow a Housing First, Harm Reduction and Eviction Prevention approach; and
* Promote social supports and connect tenants to ongoing community-based resources and skill building opportunities to strengthen personal and community resiliency.
1. **Each proposal must demonstrate:**
* Experience in working collaboratively and establishing effective partnerships with other service providers;
* Experience in delivering housing support programs specifically targeted to vulnerable individuals, including people have experienced long-term homelessness, or who are at risk of homelessness, including in the following areas:

Responding to and supporting clients with mental health needs and addictions;

Complex case management;

Housing First informed service delivery;

Working with vulnerable and marginalized sectors;

Working with a trauma informed and harm reduction lens;

Community development and safety

System navigation and familiarity with accessing services at various levels of care; and

Data collection and reporting for evaluation and quality assurance purposes.

1. **Each proposal must agree to:**
* Fill current and future unit vacancies via SSHA's Coordinated Access to Housing Supports Program (CAHS) which will target clients who currently use homelessness support programs, and connects referrals from these programs to housing and support services;
* Work with the City, as required, to coordinate program oversight, outcome reporting, case load management, referrals and standardized support assessments;
* Implement standardized tools to enhance client assessment, support service provision, and facilitate reporting and evaluation, as required by the City; and
* Track and report outcomes, as required by the City, to inform further development of housing with support models and ongoing service improvement.

## 3.3 Support Services

**Intensity of Support**

The level of support should vary dependent on individual client needs and provided at a sufficient staff to client ratio in order to meet case management needs. Agencies may wish to propose a program which provides different levels of support which tenants can move between. The following staff to client ratios should be used as a guide when determining the intensity of supports offered by a program. The ratios are reduced for programs targeted at youth tenants, as recommended by the [Canadian Observatory on Homelessness.](http://www.homelesshub.ca/sites/default/files/COH-AWH-HF4Y.pdf)

|  | **Standard staff to client ratio** | **Youth staff to client ratio** |
| --- | --- | --- |
| Lower support | 1:25-30 | 1:20-25 |
|  | 1:20 | 1:15 |
| Higher support | 1:10 | 1:7 |

**Types of Supports**

Supports provided to tenants will be responsive to tenants support needs which may fluctuate over time, however, the overall purpose of the program is to stabilize housing, prevent a return to homelessness, build community connections, and increase tenant skills required to sustain housing.

Proposals should include the provision of the following types of supports:

* Responsive, client-centred support services to help new tenants stabilize and maintain their housing;
* Responsive and client-centred support services to tenants who may be at risk of eviction, including building tenant skills and knowledge of their rights and responsibilities as a tenant, liaising with the landlord (where required) to ensure the rent is paid, and if needed, facilitate landlord mediation to encourage housing stabilization;
* Rehousing support, where appropriate, to tenants who no longer wish to remain housed in the units, or who have been evicted, with the goal of preventing a return to homelessness;
* System navigation, referrals and accompaniment to a wide array of community-based supports, services, programs and appointments based on client goals, needs and choices, with a focus on housing stabilization. Supports might include social, community, cultural and recreational activities, including life and social skills development, mental and physical health and wellness, and/or substance use/harm reduction services;
* Opportunities for community building and social connectedness, including opportunities for tenants to interact socially with each other, and with the broader community; and
* Assisting clients to move towards achieving long-term income stability which may include collaboration with Toronto Employment and Social Services (TESS)/Ontario Works (OW), referrals to employment supports, navigating the Ontario Disability Support Program (ODSP) system, and other financial stability programs.

## 3.4 Referral sources

Tenants of the program will be referred from City funded shelters, 24-Hr drop-ins, eviction prevention programs, tenant relocation projects, or Streets to Homes and will be connected with housing with appropriate supports via SSHA's Coordinated Access to Housing Supports program.

Standardized support assessment tools will be used in the referral process to ensure clients are connected with housing with appropriate levels of support. These tools will be provided to successful agencies.

**3.5 Program requirements:**

* Use a Housing First, Harm Reduction, and Eviction Prevention approach;
* Participate in SSHA's Coordinated Access to Housing Supports (CAHS) Program, including requirements for filling vacancies, attendance and engagement in any case conferencing and referral processes, following any policies and procedures outlined in the CAHS program;
* Adopt any case management or reporting software that the City may require;
* Adopt any standardized assessment tool that the City may require;
* Actively involve the tenant in planning, goal setting and decision making;
* Conduct regular tenant check-ins with a focus on activities/outcomes that result in the client moving toward housing stability;
* Maintain records of interactions with clients, including details of external referrals, case management notes, and eviction prevention activities; and
* Comply with the [Ontario Municipal Freedom of Information and Protection of Privacy Act](https://www.ontario.ca/laws/statute/90m56) (MFIPPA) and all other relevant legislation;

Administrative, information gathering, and reporting requirements:

* Submit tenant-level reports to the City of Toronto in the format and on a schedule determined by the City of Toronto (see Appendix 3 for sample);
* Sign a confidentiality agreement;
* Have access to a computer and the internet to carry out duties related to the Program;
* Comply with the Program service model as defined by the City;
* Collect and record data for the purpose of informing continuous quality improvement and evaluation of City programs;
* Provide assistance with implementing research and evaluation-related initiatives for the Program, as requested by the City; and
* Participate in site visits conducted once per year during the Program or more frequently if deemed necessary.

# WHO SHOULD APPLY AND ELIGIBLE TYPES OF SERVICE

## Agencies must:

1. Be current housing support providers, located in the City of Toronto and whose primary activities take place within boundaries of the City of Toronto;
2. Be an incorporated not-for-profit agency with a recent Audited Financial Statement. Unincorporated agencies, or incorporated agencies without a recent Audited Financial Statement may apply with a trustee. **For-profit organizations are not eligible;**
3. Be in good standing with the City of Toronto, if applicable (refers to agencies that have received funding from City grants programs in the past) and have met the terms and conditions of all previous grants;
4. Comply with the City of Toronto Anti-racism, Access and Equity Policy (Appendix B); and
5. Demonstrate reasonableness of its unrestricted reserves (Appendix C).

## Expenses

**Eligible expenses**

The following expenses are eligible for funding under this RFP, with up to a maximum of 15% available for administrative costs.

For Support Services

* Staffing costs, including, but not limited to, salaries for:
	+ - Personal support workers;
		- peer support workers;
		- residential support workers;
		- housing support workers;
		- case managers;
		- vocational/social activity instructors; and
		- cooks

Other staff expenses, including staff oversight, training, travel, and office equipment

Additional tenant related services/supports, such as translation services, social and recreational activities, and meals.

**Ineligible Expenses**

The following expenses are not eligible to be included in project proposals:

* Clinical supports, including primary health care (for example, the treatment of conditions, diseases and other illnesses); addictions treatment; withdrawal management; and personal nursing care. This includes positions that require nursing or other medical training.

# PROPOSAL EVALUATION CRITERIA

The following is a summary of some of the criteria that will be used to evaluate each project proposal:

| **EVALUATION CRITERIA** | **Points Available** |
| --- | --- |
| Organization Eligibility (see requirements in Section 4.1) | Pass/Fail |
| **Organization Background and Experience (Section 2)*** Relevant history and experience delivering housing and support services to vulnerable individuals with complex needs who have a history of homelessness, or are at-risk of homelessness; and
* Relevant experience of the organization to carry out the proposed project, including experience collaborating and partnering with other service providers.
 | 20 |
| **Housing Supports Delivery Model (Section 3)** * Proposal clearly describes an overview of the project and demonstrates an understanding of the needs of people who have a history of long-term homelessness;
* Proposal provides a clear plan of how a Community Action Plan will be conducted;
* Proposal identifies what service gaps will be addressed through the project and how the additional support services will support the target group/s;
* Proposal reflects a Housing First, Eviction Prevention, and Harm Reduction approach;
* Proposal demonstrates that services will be responsive to the complex needs of individual tenants of the Program;
* Proposal clearly describes the housing with supports model that will be used to enhance the housing stability of future and current TCHC rooming house tenants;
* Proposal describes the discharge plan to support clients if they wish to leave the program;
* Proposal describes approaches to liaise with TCHC and the City on improvements or changes to the model as required to support clients to maintain their housing;
* Proposal demonstrates an ability to work with tenants to access resources, and supports, and provide crisis intervention to proactively avoid eviction;
* Proposal demonstrates an ability to develop and implement effective partnerships to promote housing stability;
* Proposal demonstrates an ability to engage with local communities
 | 45 |
| **Work Plan (Section 3)*** Work plan is clearly presented, identifying appropriate project objectives, activities, outputs and outcomes.
 | 15 |
| **Proposed Budget and Staffing (Section 4)*** Budget is reasonable and reflects project operating and administrative costs;
* Administrative costs do not exceed 15% of proposed budget;
* Demonstrates efforts to secure best value for money; and
* Other sources of funding and/or in-kind supports are identified.
 |  20 |
| **TOTAL**  | **100** |

Through this Application process the City is committed to funding a variety of housing with supports, across the City of Toronto.

The City reserves the right to reward financial assistance to none, one or more of the Proponent(s) based on the availability of funding.

# CLARIFICATIONS & INTERVIEWS

## 6.1 Clarifications

As part of the evaluation process, the review team may make requests for clarification with respect to the content of any proposal in order to clarify its understanding of the Proponent’s response. The clarification process shall not be used to obtain required or additional information that was not submitted at the time of the RFP deadline or to promote a particular Proponent.

The Evaluation team may request clarification from one or more Proponents and not from others.

## 6.2 Interviews

A Proponent may be invited to an interview, the results of which will be used as a mechanism to revisit, revise, confirm and finalize the evaluation score. Interviews may be conducted in person or by phone.

The representative of an Proponent at any interview is expected to be thoroughly versed and knowledgeable with respect to the requirements of this RFP and the contents of its proposal, and must have the authority to make decisions and commitments with respect to matters discussed at the interview, which may be included in any resulting legal Agreement.

No Proponent will be entitled to be present during, or otherwise receive, any information regarding any interview with any other Proponent.

City staff may interview any or no Proponent(s) without interviewing others, and the City will be under no obligation to advise those not receiving an invitation.

## 6.3 Evaluation Assessment

Proposal evaluation results shall be the property of the City and are subject to the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA). Evaluation results may be subject to public release pursuant to MFIPPA.

# TIMELINES AND RFP PROCESS

## 7.1 Timelines

The Deadline for submitting full proposals is **12 pm** **Noon March 13, 2018**

|  |  |
| --- | --- |
| **RFP Process Timelines*****(timeframes are approximate)*** | **Date** |
| RFP released | Week of Feb 5, 2018 |
| **Information Session:** City Hall, Committee Room 2 email registration to tenantsfirst@toronto.ca  | February 21, 20188:30 – 10:30 am |
| Deadline for Written Questions from Agencies | February 27, 2018 |
| Release of Addendum  | March 6, 2018 |
| **RFP Submission Deadline** | **March 13, 2018 by 12pm Noon** |
| Recommendations Approved – Notifications Sent | April 3, 2018 |
| Agreements executed | Week of April 16, 2018 |
| Funding Commences | \*May 1, 2018 |

\* The City's intention is to commence funding these projects by May 1, 2018, however, due to the tight timelines of this RFP, the execution of the agreement may occur after May 1, 2018. Agencies will be notified if the City of Toronto intends to fund the agency effective May 1, 2018.

Proposals will be evaluated by an Evaluation Committee that is comprised of City staff and may include staff from other orders of government, and members of the community. Based on the Evaluation Committee recommendations, City staff will recommend proposals to the General Manager of the Shelter, Support and Housing Administration Division, who has delegated authority from City Council to approve the funding recommendations.

## 7.2 Information Session

You must pre-register for the information session by emailing tenantsfirst@toronto.ca

Agencies should send a maximum of 2 people. Preferably one of these people will be responsible for writing the RFP. If you are unable to attend one of the information sessions, you **MUST** email tenantsfirst@toronto.ca.

## 7.3 Questions

All contact and ques­tions concerning this RFP should be directed in writing to tenantsfirst@toronto.ca by February 27, 2018. Questions and answers will be posted electronically as an Addendum to the RFP.

## 7.4 Addendum

If it becomes necessary to revise any part of this RFP, post questions and answers or clarify aspects of the RFP, the information will be by Addendum circulated electronically and noted on the City website. Agencies should monitor that site as frequently as they deem appropriate until the day of the Deadline. Only answers to issues of substance will be posted. The City reserves the right to revise this RFP up to the Closing Deadline.

The City will make all reasonable efforts to issue the final Addendum (if any) no later than five (5) days prior to the Deadline.

# PARTNERSHIPS AND COLLABORATION

Where appropriate, Proponents are encouraged to develop formal partnerships where this would be beneficial to the project. Formal partnerships refer to projects in which other agencies work with the Proponent and are to be actively involved in project activities. This involvement may range from sitting on a project advisory committee, to jointly developing service protocols among agencies, to involvement in providing direct service to clients participating in the Program.

When a consortium or partnership proposal is submitted, the Proponent (or trustee, if appropriate) is considered as the Prime Proponent and therefore assumes all responsibilities of the sub-Proponent(s) and ensures that all obligations of the Agreement are met. It is understood that activities related to formal partnership arrangements may have associated costs and such costs may be considered as eligible.

Formal agreements with a partnering agency or agencies require a confirmation letter from the partnering agency or agencies outlining the terms of the Agreement.

Proposals for projects that combine funding under this RFP with other sources of funding are also encouraged.

# EXPECTATIONS OF APPROVED PROPONENTS

Approved Proponents may be requested to refine their project Work Plan, budget and project objectives, outputs and outcomes in conjunction with City staff. All Work Plans are required to contain quantifiable outcomes. The City will set performance measures and incorporate these performance measures into a legal Agreement containing the terms and conditions for the project. Upon contract execution, funding will be subject to the terms and conditions set out in the Agreement.

Regular progress and financial reporting will be required on a schedule to be determined by the City. Approved Proponents are required to report outcomes and data on a range of indicators that apply to their proposed project Work Plan. Indicators will be evaluated based on projected service targets as identified in the Work Plan.

Proponents must be aware that they agree to absorb any costs above the requested amount deemed necessary to complete the project. In addition, they must be prepared to assume any ongoing operational costs related to the project following its completion.

# Appendix A: Conditions for Proposal Submission

1. In submitting a proposal, the party that responds to this Request for Proposals (the “Proponent”) acknowledges that they have no expectation for the City to continue funding from another source of funding administered by the City after the completion of the project.
2. The Proponent must be incorporated, and the submission must be properly executed by the corporation's authorised signatories. In all cases, the name and office of the signatory must be legibly printed underneath the signature.
3. The City, through its Council or a Committee thereof, or City Staff may extend or abridge the Deadline or set new Deadline(s) at any time in their sole and absolute discretion, such extended, abridged or new time period(s) to thereafter become the “Deadline”.
4. City Staff, in its sole and absolute discretion, may discuss or negotiate with any Proponent, the terms and conditions of its submission without any obligation to other Proponents and without giving rise to any rights of other Proponents to amend or negotiate their submission.
5. In the event of any discrepancies appearing, or differences of opinion, misunderstanding or dispute arising between the Proponent and the City respecting the intent or meaning of this Request, or accompanying documents, or as to any omission therefrom or misstatements therein, the decision and interpretation of the City shall be final and binding upon all parties. There shall be no review or appeal of such decision.
6. Each Proponent acknowledges and agrees that the City is likely to receive and be required to deal with many submissions, all of which may contain or disclose information considered by their authors to be of a special, unique, secret, or proprietary nature, and that such information, and the manner in which the City may use it, may be entitled or subject to protection under any of Canada’s intellectual property laws, the Competition Act, or the common law relating to unfair competition. The City cannot accept any submission that is subject to a reservation by its author of any such rights. Each Proponent, by virtue of filing a submission pursuant to this Request, expressly waives any and all protection to which the Proponent might otherwise be entitled in respect of that submission under all the foregoing laws, and expressly releases the City, its officers, staff and consultants, as well as the successful Proponent(s) from any and all liability and any claims, actions, suits and proceedings whatsoever for the infringement of any intellectual property right or for the use of any secret or proprietary information disclosed to the City.
7. All submissions are subject to the Municipal Freedom of Information and Protection of Privacy Act, and may be subject to release pursuant to this Act, notwithstanding the request of those responding to keep their submissions confidential. In addition, as part of the selection of the successful Proponents, summaries of all submissions received, and details of any Agreements to be entered into between the City and the successful candidates may constitute part of a public report to City Council and its Committees.
8. Each Proponent shall indemnify and save harmless the City of Toronto, its officers, staff and consultants, from and against all claims, actions, suits and proceedings, including all costs and expenses of every nature whatsoever, incurred directly and indirectly by the City of Toronto in connection therewith, brought by any person in respect of the infringement or alleged infringement of any patent, copyright, trademark or industrial design, or their use or misuse in connection with its submission.
9. The City of Toronto shall not be responsible for any costs or expenses incurred by the Proponent in the preparation and presentation of submissions.
10. The City, through its Council or a Committee thereof, or City Staff has the right to cancel or withdraw this Request for Proposal for any reason and at any time, without incurring any costs or liability for costs or damages incurred by any Proponent, including without limitation, any expenses incurred in the preparation of a submission. It is the clear intention of the City that in providing this Request for Proposal, and in receiving submissions in response to it, no contractual or other legal relationship will result therefrom.

# Appendix B: Anti-Racism, Access and Equity Policy and Guidelines

**Applicable to Recipients of Grants from the City of Toronto and its agencies, boards and commissions**

**Approved by City Council, December 16 & 17, 1998**

**(Strategic Policies & Priorities Committee Report 6, Clause 5)**

I. Policy Statement:

The population of the City of Toronto is made up of people from diverse communities and equity‑seeking groups, e.g., women, people with disabilities, ethno-cultural and racial minorities, immigrants and refugees, faiths, the socio-economically disadvantaged, Aboriginal peoples, lesbian, gay, bisexual, transgendered persons. In recognition and support of this diversity, the City as a funder will ensure that:

(1) It provides access for organizations representing these communities to the grants programs provided by the City of Toronto. This includes access to grants information, applications, staff resources, decision‑making and funding; and

(2) The services, programs and decision‑making provided by organizations receiving grants are accessible to all residents of Toronto and that organizations receiving City grants are free from discrimination.

This policy recognizes that the changing nature of the population has implications for the operation of the City's grants programs as well as the delivery of services supported by City grants. In this context, the City recognizes that:

(1) Barriers to services exist for members of the City's diverse communities, particularly for equity‑seeking groups;

(2) Organizations representing equity‑seeking groups (e.g., women's organizations, Aboriginal organizations, ethno-specific and disability organizations) must continue to play a critical role in service delivery; and

(3) The City of Toronto, as a funder, must act as a positive force in assisting the elimination of these barriers by providing support to both mainstream and equity‑seeking organizations through the change process.

Access to services is the ability or extent to which communities or residents can attain needed services and achieve full participation in the planning, development, administration and delivery of those services. Access includes consumer/client access and organizational access.

To achieve this:

(1) The City of Toronto will ensure its diverse communities, particularly those facing barriers and other forms of discrimination and disadvantage, have equitable access to its own services, resources and decision‑making in order that all communities can fully participate in the City's social, economic, cultural and political life.

(2) The City of Toronto will also require organizations receiving City grants to undertake planned and coordinated activities aimed at enabling diverse communities, particularly those facing barriers and other forms of discrimination and disadvantage, to participate fully in their services, programs and decision‑making.

(3) The City of Toronto undertakes this because it believes that when every individual makes a conscious effort to bring about equality and to engage in egalitarian practices, the City will be able to effect the systemic and social changes needed to create a community where all people live with dignity and peace. The City of Toronto also believes that its diverse communities need to partner with and assist each other in developing actions to eradicate discrimination and attain equality in our society and that the City can play a proactive and supportive role in this process.

II. Implementation

To implement these principles, the City of Toronto's grants programs will ensure that:

(1) All organizations receiving City grants are non‑discriminatory and promote the goals of anti‑racism, access and equity;

(2) All organizations receiving City grants take reasonable steps to ensure their services, programs and decision‑making reflect the community they serve;

(3) The City of Toronto's grants programs are accessible to organizations from Toronto's diverse communities, including organizations representing equity‑seeking communities; and

(4) All required documentation and conditions will be reasonable and grants will not be withheld if the Proponent is taking reasonable steps to comply with City policy.

Actions required to achieve this are described below:

(1) Declaration of Non‑Discrimination

Every person has the right to live, work and serve in an environment free of individual as well as systemic harassment and discrimination. Regarding the operation of the City's grants programs, the City of Toronto requires that all individuals and organizations adopt a policy of access and non‑discrimination based on the City's Human Rights Policy as a condition of receiving a grant or other support from the City's grants programs. Discrimination means someone is being treated unfairly because of her/his status. In some cases, discrimination also means someone is being treated unfairly because he or she receives welfare, or if the person has been pardoned for a criminal offence. The Declaration of Non-Discrimination Form must be completed by individuals and organizations applying for grants or other supports.

Discrimination is prohibited on the grounds of Age, Ancestry, Citizenship, Creed (religion), Colour, Disability, Ethnic Origin, Family Status, Gender Identity, Level of Literacy, Marital Status, Membership in a union or staff association, Place of Origin, Political Affiliation, Race, Receipt of Public Assistance, Record of Offences, Sex, Sexual Orientation or any other personal characteristic. (The City of Toronto’s Human Rights & Harassment policy protects grounds which are in addition to those protected under the Ontario Human Rights Code. These grounds are: gender identity, level of literacy, political affiliation. The Human Rights & Harassment policy has been approved by City of Toronto Council at its meeting on December 16-17, 1998 as embodied in Clause 2 in Report No. 19 of the Corporate Services Committee).

Discrimination could occur on the basis of employment, services, contractual arrangements, or membership in unions. It is essential to develop complaint/ mediation policies for incidents that could occur between employees, employees and management, employees and volunteers, employees and consumers, as well as between agencies.

(2) Anti‑Racism, Access and Equity Components:

The following components are provided as guidelines to assist organizations receiving City grants in their efforts to integrate anti‑racism, access and equity throughout their operations. The components address anti‑racism, access and equity in the following areas: (a) Governance; (b) Employment; (c) Services; (d) Choice; (e) Training and Education; and (f) Information and Communications.

(a) Access to Governance ‑ Organizations receiving City grants will ensure that members of the City's diverse communities have equitable access to the organization's decision‑making process. This includes decision‑making, policymaking, budgeting and allocations. The Board of Directors, its volunteer committees and staff need to be representative of the diversity of the community it serves, as well as be responsive to the changing demographics. New board members should be educated and trained to effectively govern the organization. The Board has to be accountable to its members and communities.

(b) Access to Employment ‑ Organizations receiving City grants will ensure that members of the City's diverse communities have equitable access to employment. This includes recruitment, selection, staff development, performance evaluation, retention, promotion, termination. It also requires the identification and removal of systemic barriers so that the organization's staff are representative of diverse communities and are able to serve the needs of the changing population.

(c) Access to Services ‑ Organizations receiving City grants will ensure that they undertake planned and co‑ordinated activities aimed at making their services and programs accessible to diverse communities. This includes examining and making appropriate changes to those who provide the organization's services, those who are receiving services and the way in which services are provided to ensure they are non‑discriminatory and promote the goals of anti‑racism, access and equity. In this context, the organization's outreach, communications, and structures for intake, referral, needs assessment, program planning, monitoring and evaluation must be examined and appropriately changed.

In addition, organizations receiving City grants must take into consideration provision of services to disadvantaged individuals, low‑income persons, families in poverty, and equity‑seeking communities.

(d) Access to Choice ‑ Organizations receiving City grants will ensure that their services, programs and decision‑making provide a range of service options that enable the consumer or the community to make their own decisions about their lives and their community issues.

(e) Access to Training and Education ‑ Organizations receiving City grants will ensure that those involved in the delivery of services and programs are able to participate in appropriate education and training aimed at improving their knowledge, understanding and skills in order to work with and provide services to members of diverse communities, particularly equity‑seeking communities.

Such training and education may involve Board members, staff and volunteers and include orientation and development in the areas of anti‑racism, human rights, accommodation for people with disabilities, sexual orientation in the workplace and the community, etc.

(f) Information and Communications ‑ Organizations receiving City grants will ensure that information on its services, programs and decision‑making and how they can be accessed as well as all of the organization's communications appropriately portray and are accessible to diverse communities. This includes external and internal communication and must address multilingual requirements as well as accommodate those who are sight and hearing impaired.

It is essential that the components listed above are implemented with an anti‑racist approach. In this context, organizations receiving City grants will be involved in the development and promotion of unbiased attitudes, beliefs, policies and procedures as well as the identification and elimination of derogatory behaviours, actions, and practices of Board members, staff, volunteers, community members, residents and the organization's policies and procedures that have a direct or adverse impact on Aboriginal, ethno‑racial and linguistic minority communities.

III. Access to City Grants Programs:

In terms of the City's responsibilities, each City grant program will include the following into the operations of their grants programs:

(1) Environmental Scanning and Priority Setting:

This will require all grants programs to identify demographic, community and service trends, priorities of other funders, gaps in service and program delivery. This is done to enable grants programs to establish priorities for funding on a regular basis and, thereby, to encourage grants Proponents to establish programs and services which meet community issues and needs.

(2) Allocation of Funds:

This will require all grants programs to undertake to provide funding based on both indicators of community need and community demographics. The issue of need as well as community demographics are determined in the environmental scanning process. In considering the allocation of funds, each grants program will need to determine the demographic make‑up of the organizations seeking and receiving funding and undertake to ensure an equitable distribution of funds. Particular consideration will be given to organizations representative of equity‑seeking communities.

(3) Outreach and Community Development:

This will require all grants programs to determine the most appropriate strategies to provide community outreach and development. Each grants program will ensure a planned and co‑ordinated approach to these activities in order to increase the capacity of diverse communities and their organizations, particularly those representing equity‑seeking groups.

(4) Setting Performance Standards and Monitoring Results:

This will require all grants programs to establish performance measures to guide the administration of grants programs and to set ways in which the grants administration process can be reviewed, assessed and improved. Monitoring results of grants administration is also essential to ensuring such programs are achieving their objectives, particularly respecting equity‑seeking groups.

(5) Assessment of Organizations:

This will require each grants program to ensure that its funded organizations or recipients of other supports fulfil the anti‑racism, access and equity policy outlined above. The policy is designed to ensure full civic participation of all communities and specifically to engage in efforts to achieve equality for all of Toronto's communities.

In addition, each grants program will require organizations receiving funds to develop access and equity action plans and to submit a report on this annually along with the grants application form. This information will be used in the grants assessment as well as become part of the information which will be analysed and submitted to Council.

IV. Policy Implementation:

All of the City's grants programs are required to integrate the above policy and principles within their operations. This will be done in ways that are appropriate to the operations of each grants program and their capacity to undertake the activities identified above. To ensure this is being done, all grants programs will report annually on actions being taken to implement this policy.

In addition to reporting out annually, all grants programs will work together to streamline requests from organizations receiving grants from more than one City grant program.

Terms of organizations receiving grants:

(1) All organizations will be required to file a Declaration of Non‑Discrimination;

(2) Organizations with total annual operating budgets greater than $25,000.00 will be required to submit documentation regarding their anti‑racism, access and equity policies.

(3) Organizations receiving one‑time grants will be required to include in their grant request how they intend to address the City's policy principles.

The City of Toronto recognizes that inequities, discrimination and disadvantage are generated and maintained through various means, including individual and systemic practices. To address this, the City recognizes that it, as well as organizations seeking and receiving City grants, needs to support the creation of an equitable society. Failure or unwillingness to engage in such activities could result in negative consequences and result in the withholding of City funding or the rejection of an application for funding.

*Clause # 5, Report # 6 of the Strategic Policies and Priorities Committee Adopted by Toronto City Council December 16 & 17, 1998*

# Appendix C: Policy on the Consideration of Unrestricted Reserves and Operating Surpluses in the Assessment Process

**Reserves**

“Unrestricted” reserves are those funds that have not been restricted by the donor and whose use is, therefore, at the discretion of the Board of Directors of the organization or one of its affiliated organizations (such as a trust fund, property corporation or foundation).

“Restricted” reserves are funds designated for a specific purpose by the donor and over which the Board of the organization and its affiliates have no discretion.

It is desirable for organizations to have a reasonable level of unrestricted reserve funds to meet the following kinds of needs:

* Offsetting operating deficits
* Establishing new or expanded programs
* Repairing and renewing fixed assets
* Capital expansion
* Positive cash flow.

The size of a Proponent organization’s unrestricted reserve will be considered during the assessment and allocations process.

**Thresholds**

As part of the assessment and allocations process, Proponent organizations are required to provide information necessary to determine the size of their unrestricted reserves in terms of months of operating expenditures.

Unrestricted reserves that are greater or equal to 1 month of operating expenses and less than or equal to 3 months operating expenses will not generally receive further consideration during assessment or allocations process (because they are considered to be reasonable.)

**Unrestricted Reserves in Excess of Three Months Operating Expenditures**

Proponent organizations with unrestricted reserves larger than 3 months of operating expenditures will be required to submit additional information to establish the reasonableness of the size of the reserves.

An assessment of the “reasonableness” of the size of the reserves will include:

* An examination of the intended use of the fund
* An examination of the previous use of the fund
* A review of the Board approved policies and procedures related to the fund
* A review of the organization’s sources of funding.

If an organization’s unrestricted funds are assessed as being larger than reasonable, the project requests submitted by the organization will be considered a low priority in the assessment and allocations process.

**Unrestricted Reserves Less than One Month's Operating Expenditures**

Proponent organizations with unrestricted reserves of less than 1 month operating expenditures will be required to submit additional information demonstrating the organization’s ability to meet its legal and financial obligations, and its financial viability.

If an organization’s unrestricted funds are assessed as smaller than required to meet legal and financial obligations, or to impact on the organization’s financial viability, the project requests submitted by the organization will be considered a low priority in the assessment and allocations process.