



CIH Canada
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REQUEST FOR PROPOSALS #19-268-06 CIH CANADA

ASSOCIATION MANAGEMENT SERVICES

Date Issued: Monday, January 28, 2019

Closing Date: Tuesday, February 19, 2019
By 2:00 p.m. EST (Toronto time)

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1. INTRODUCTION

In 2013, Housing Services Corporation (HSC) and the Chartered Institute of Housing (UK) entered into a 50/50 partnership to create CIH Canada in order to advance the principles of housing education, professional accreditation and membership in Canada. Since that time, CIH Canada has achieved success through both its core curriculum and the Founder's programs that were offered across Canada. With more than 200 housing professional members, CIH Canada has developed strong partnerships with a number of provincial sector organizations and continues to pursue opportunities to expand on these relationships.

CIH Canada is now in the position to move to a member-based governance model in 2019 with decisions with regard to the strategic and business plan of CIH Canada to be made by a member based executive committee. To support this objective, HSC plans to step away from its role as the Canadian host and administrator.

CIH Canada is seeking individuals or organizations to provide Association Management Services to CIH Canada on a fixed fee basis for a period of 18 months. This time period has been selected to allow a number of additional governance changes leading to a Canadian- and member based- model to take place, after which point a longer term role will be offered.

This RFP is not a formal tender call and does not create any binding legal obligations on CIH Canada.

The purpose of this RFP is to select a qualified Proponent (Selected Proponent) with whom CIH Canada shall negotiate the definitive agreement (Agreement) to deliver the services described in this RFP. At CIH Canada's sole discretion, it can terminate the Contract negotiations with any Selected Proponent and continue or begin negotiations with another Selected Proponent. No Selected Proponent shall have any rights against CIH Canada arising from these negotiations.

1.1 Background

CIH Canada

CIH Canada is part of the Chartered Institute of Housing (CIH), an international network based in the United Kingdom that exists to maximize the contribution that housing professionals make to the well-being of communities. Formed in 1916, CIH is the professional body for housing and supports the housing sector to learn, improve and influence. CIH Canada members are part of a community of over 22,000 international housing professionals working in both the private and public sector in 20 countries on five continents across the world.

Our programs empower people working in Canada’s affordable housing sector with the skills and knowledge they need to become leaders and to help influence the thinking that shapes housing and community agendas. Housing professionals are given a platform to share best practices, develop their knowledge and skills to deliver excellence for their organizations.

The programs offered by CIH Canada enable people working in the housing sector to achieve professional designations that signify expertise in housing management and administration.

CIH Canada offers two levels of professional designations:

- *Certified Practitioner (CertCIH)* – focuses on operational issues and the needs of frontline housing professionals who are new to the sector or have experience that is highly focused in a single area; provides a broader understanding of the housing system and draws on wider best practice across the sector.
- *Chartered Member (CIHCM)* – considered the internationally recognized gold standard for housing professionals; provides skills in policy making and delivering housing services at a management level with a focus on strategic issues facing the sector both nationally and internationally.

Our diverse and growing membership includes professionals of all levels, and is focused on preparing the next generation of housing professionals.

CIH Canada members are largely in Ontario, Manitoba, Alberta and British Columbia. This is largely due to the strong provincial bodies that exist in those provinces which have assisted in member engagement. CIH Canada however is interested in expanding its membership more broadly across Canada. It should be noted that CIH Canada does not currently offer its programming in both official languages. In order to serve the French speaking population, CIH Canada would look to partner with local education providers and seek to accredit new and existing programs, delivered in French, to lead to both of CIH Canada’s professional designations.

2. SCOPE OF SERVICES

2.1 Requirements

CIH Canada requests Proponents to review the requirements outlined in Appendix A and provide CIH Canada with the information as indicated in the Form of Response, attached as Appendix B.

2.2 Contracting Approach

It is the present intention of CIH Canada to enter into a contract with the Successful Proponent to deliver the Services.

The term of the Agreement will be for 18 months. This time period has been selected to allow a number of additional governance changes leading to a Canadian- and member based- model to take place, after which point a longer term role will be offered.

The Successful Proponent shall provide the services in accordance with the Services stated in this RFP, the Agreement, and such other terms as shall be agreed upon by the Successful Proponent and CIH Canada.

The Agreement to be signed by the Successful Proponent shall be in the form required by CIH Canada and shall include the following terms:

- The Successful Proponent shall perform the work outlined in Appendix A - Scope of Services.
- At the sole discretion of CIH Canada, the Successful Proponent can be used for additional skills or services to those identified in Appendix A - Scope of Services, provided that the skills or services relate to the identified area of expertise.
- Pricing is fixed for the period of the Agreement.

The form of Agreement to be signed by the Successful Proponent is attached as Appendix C. Any comments to this form of Agreement must be included in the Form of Response, attached as Appendix B.

3. CONFIDENTIALITY

All information provided by or obtained from CIH Canada in any form in connection with this RFP either before or after the issuance of this RFP:

- a) is the sole property of CIH Canada and must be treated as confidential;
- b) is not to be used for any purpose other than replying to this RFP and the performance of any subsequent Agreements;
- c) must not be disclosed without prior written authorization from CIH Canada; and
- d) shall be returned by the Proponents to CIH Canada immediately upon the request of CIH Canada.

4. EXECUTION OF SERVICES AGREEMENT AND NOTIFICATION

CIH Canada reserves the right in its sole discretion and for any reason whatsoever:

- a) to accept or to reject any or all Proponent responses in whole or in part,
- b) not to proceed with all or any part of the services under this RFP, or
- c) issue a second RFP.

Once an Agreement is signed with the Successful Proponent, CIH Canada shall notify the other Proponents that they have been unsuccessful in this RFP.

5. PROPONENT INSTRUCTIONS

5.1 Questions

Any questions on this Request for Proposals should be directed in writing via e-mail to Rosabelle Gonzales at rfp@hscorp.ca no later than 2:00 p.m. EST on Monday, February 4, 2019.

5.2 Responses to this RFP

Proponents must include all information requested and provide it in the order in which it is requested on the Form of Response, attached as Appendix B. Proponents that fail to provide all information requested may be disqualified.

Proponents must complete each section of the attached Form of Response document.

Proponents shall submit their response to this RFP via HSC’s Bonfire portal.

Please follow these instructions to submit via our Public Portal.

- Prepare your response materials:

Requested Information

| Name | Type | # Files | Requirement |
|------------------|----------------------|----------|-------------|
| Form of Response | File Type: Any (*.*) | Multiple | Required |

Requested Documents:

Please note the type and number of files allowed. The maximum upload file size is 100 MB.

Please do not embed any documents within your uploaded files, as they will not be accessible or evaluated.

- Upload your response at:

<https://hscorp.bonfirehub.ca/opportunities/20317>

Your response must be uploaded prior to the Closing Date of **Tuesday, February 19, 2019 by 2:00 PM EST**. We strongly recommend that you give yourself sufficient time and at least ONE (1) hour before the Closing Date to begin the uploading process and to finalize your response.

Important Notes:

Each item of Requested Information is instantly sealed and will only be visible after the Closing Date.

Uploading large documents may take significant time, depending on the size of the file(s) and your Internet connection speed.

You will receive an email confirmation receipt with a unique confirmation number once you finalize your response.

Minimum system requirements: Internet Explorer 8/9/10+, Google Chrome, or Mozilla Firefox. Javascript must be enabled.

Need Help?

CIH Canada, through Housing Services Corporation, uses a Bonfire portal for accepting and evaluating proposals digitally. Please contact Bonfire at Support@GoBonfire.com for technical questions related to your response. You can also visit their help forum at <https://bonfirehub.zendesk.com/hc>.

5.3 Participation Instructions

Information directing prospective Proponents to the RFP documentation will be made available on the following electronic tendering services: MERX - website: www.merx.com, e-mail: merx@merx.com, telephone number: 1-800-964-6379; Biddingo.com - website: www.biddingo.com, e-mail: info@biddingo.com, telephone number: 1-888-891-8314; as well as HSC's website www.hscorp.ca.

5.4 Amending or Withdrawing Proposals Prior to Proposal Submission Deadline

At any time prior to the Proposal Submission Deadline, a Proponent may amend or withdraw a submitted proposal.

5.5 CIH Canada May Seek Clarification and Incorporate Response into Proposal

CIH Canada reserves the right to seek clarification and supplementary information relating to the clarification from Proponents after the Proposal Submission Deadline. The response received by CIH Canada from a Proponent shall, if accepted by CIH Canada, form an integral part of that Proponent's proposal. CIH Canada reserves the right to interview any or all Proponents to obtain information about or clarification of their proposals. In the event that CIH Canada receives information at any stage of the evaluation process which results in earlier information provided by the Proponent being deemed by CIH Canada to be inaccurate, incomplete or misleading, CIH Canada reserves the right to revisit the Proponent's compliance with the mandatory requirements and/or adjust the scoring of rated criteria.

5.6 Evaluation Process

CIH Canada will conduct the evaluation of proposals in the following two (2) stages:

Stage I

Stage I will consist, in part, of a review to determine which proposals have complied with the mandatory requirements outlined below.

| | MANDATORY REQUIREMENTS | YES / NO |
|----|---|-----------------|
| 1. | Proposal received on time | - |
| 2. | Form of Response submitted and signed by authorized representative(s) | - |

Qualified proposals that meet all mandatory requirements will be scored based on the following criteria:

| | EVALUATION CRITERIA | MAXIMUM POINTS |
|----|----------------------------|-----------------------|
| 1. | Qualifications | 25 |
| 2. | Experience | 25 |
| 3. | Vision for Project | 15 |
| 3. | Pricing | 35 |
| 4. | TOTAL SCORING | 100 |

The top ranked proponents from the Stage I Evaluation Process may be invited to meet with CIH Canada in person whereby invitees will be asked to respond to questions about their proposal.

Stage II

In Stage II, the Agreement will be negotiated and finalized for execution. The final signed Agreement may contain terms different or supplementary to those contained in the Successful Proponent’s proposal.

No Proponent shall have any rights against CIH Canada arising from such negotiations or the failure to execute the Agreement.

Once a Successful Proponent has been determined by CIH Canada and the Agreement duly executed by the parties, CIH Canada shall notify the other Proponents that a final Successful Proponent has been determined.

5.7 Tentative Schedule

The following dates are tentative and are subject to change without notice:

| Task | Target Date |
|--|--|
| Posting of this RFP | Monday, January 28, 2019 |
| Deadline for questions | Monday, February 4, 2019 By 2:00 p.m. EST |
| Answers to questions and distribution of addenda to RFP, as required | Monday, February 11, 2019 |
| Closing date for submission of proposals | Tuesday, February 19, 2019 By 2:00 p.m. EST |
| Evaluation of proposals | February/March 2019 |
| Meetings with short-listed proponents, if necessary | March 2019 |
| Agreement with CIH Canada to take effect | April 2019 |
| Completion date for Services | October 2020 |

6. GENERAL CONDITIONS

6.1 CIH Canada reserves the right to accelerate and postpone the schedule for this RFP.

- 6.2 Each Proponent shall prepare at its sole cost and expense its response to this RFP. CIH Canada shall not reimburse any Proponent for its rejected response.
- 6.3 CIH Canada reserves the following rights:
- 6.3.1. CIH Canada can request that any Proponent clarify or make changes to its response.
 - 6.3.2. CIH Canada can, in its sole discretion, choose to meet with none, some or all of the Proponents to discuss their response.
 - 6.3.3. Responses that are improperly signed, illegible, contain omissions or irregularities may, in CIH Canada's sole discretion, be rejected. CIH Canada may also waive any informality or irregularity.
 - 6.3.4. CIH Canada may verify with any Proponent or third party any information set out in the response. CIH Canada may check references other than those provided by any Proponent.
 - 6.3.5. CIH Canada may disqualify any response that contains material misrepresentations or any other materially inaccurate or misleading information.
 - 6.3.6. CIH Canada, this RFP and all responses to it are governed by the Municipal Freedom of Information and Protection of Privacy Act, Ontario.

These reserved rights are in addition to any other express rights or any other rights which may be implied and CIH Canada shall not be liable for any expenses, costs, losses or direct or indirect damages suffered by a Proponent resulting from CIH Canada exercising any of its express or implied rights under this RFP.

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APPENDIX A SCOPE OF SERVICES

CIH CANADA ASSOCIATION MANAGEMENT SERVICES

The purpose of the role is to:

1. Be the main point of contact and office of CIH Canada in Canada
2. Deliver on identified opportunities offer relevant member services; including events
3. Support key relationships held by CIH Canada
4. Directly manage the operations, finance and administration of CIH Canada

The Opportunity

CIH Canada is governed by the CIH Canada Board of Directors and a member based Executive Committee. The following identifies their responsibilities:

CIH Canada Board of Directors:

- Ensure the Canadian professional accreditation framework & administration
- Oversee the Canadian e-learning content and program administration
- Ensure linkages to Chartered Institute of Housing (UK) policy and research are identified and pursued.
- Ensure general membership services and resources to support professional best practices are in place.

CIH Canada Executive Committee:

- Develop and implement a membership growth strategy
- Build strategic relationships with other relevant organizations
- Work with the CIH (UK) policy team to ensure local, Canadian issues are fed into the overall policy work and that CIH (UK) positions are promoted in Canada, when applicable
- Prepare and oversee the implementation of an annual business plan for approval by CIH Canada Board of Directors;
- Serve as a liaison with members and represent their needs;
- Manage the training offerings and activities in Canada;
- Oversee the activities of the Coordinator

It is within this governance framework that the Coordinator will function. The duties of the Coordinator are as follows:

Member Services:

- Serve as the primary contact for the Board and for CIH Canada Members.
- Develop the marketing and communication plan and provide content for stakeholder and member communications.
- Work with the Executive Committee and Local Provincial Partners to deliver CIH Canada member events and services in conjunction with the events team and associated partners.
- Manage CIH Canada marketing and communication plans and deliverables.
- Develop, implement and manage CIH Canada membership services and ensure alignment with CIH (UK).
- Provide content to CIH (UK) for updates to the website.

Financial Management:

- Prepare financial plans and annual operating budget for Executive Committee and Board approval
- Monitor receivables and payables (Invoice membership, course fees and other required dues; reconcile payments and monitor arrears)
-
- Manage the efficient and effective use of organization's resources
- Provide quarterly financial statements to the CIH Canada Board and Executive Committee
- Provide information to organization's auditor regarding preparation of annual financial statements

Board Support, Administration and Governance:

- Support and coordinate the work of the CIH Canada Board of Directors and Executive Committee.
- Ensure the agenda and supporting reports for Board and Committee meetings are provided to participants prior to meetings.
- Attend and coordinate Board and Committee meetings,
- Communicate with the Board and Committee in a concise, clear, comprehensive manner, to ensure that the Board and Committee have adequate information to carry out effective decision making.
- Participate in other administrative functions as designated by the Executive Committee and Board.

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**APPENDIX B
FORM OF RESPONSE**

Attached as a separate file.

**APPENDIX C
CONSULTING SERVICES AGREEMENT**

Attached as a separate file.