



Ottawa Shared Services Organization

**RFP - Consultant for Shared Employee Management System Software
Assessment**
June 22nd, 2023

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Introduction

The Ottawa Shared Services Organization (OSSO) is pleased to invite you to respond to this Request for Proposal (RFP) for a needs assessment for EMS (employee management software) software. OSSO provides employee scheduling, payroll and Human Resource services to our clients, including recruitment/candidate tracking.

The primary objective of this project is to conduct a comprehensive assessment/audit of OSSO's existing scheduling, HR, and payroll systems. The consultant will review the current platforms in use, identify the needs of the existing systems, and determine if a single vendor can provide an existing integrated solution that meets the requirements. The consultant will assess and identify a potential single platform to streamline processes, reducing labor-intensive shift replacing, increasing efficiencies in human resources, and handling multiple pay rules while processing payroll. We are seeking not just a consultant but someone who strategically and proactively understands change management our growth and the needs of Not-For-Profit organizations.

Corporate Information

OSSO is a not-for-profit organization set up by three organizations (OCL, OFP, and ORH) to provide financial services, human resources, Information Technology, and property management services. OSSO initially provided support to the three founding agencies, over the past year we have slowly increased our client base. We envision building up a successful shared services organization that is positioned for growth and will provide other not-for-profit organizations with the opportunity to benefit from its services in the near future.

Ottawa Carleton Lifeskills (OCL) provides support to adults with developmental disabilities through residential and day supports. With eight residences, a Supported Independent Living program, a supported apartment program, a Home Share Program, and a weekly Day Program – OCL provides support and services for over 200 people living with developmental disabilities. OCL has over 200 unionized employees.

Ottawa Foyers Partage (OFP) supports over fifty-five adults with multiple disabilities in Ottawa, Ontario. With eight homes, two supported independent living apartments, and our ComputerWise & Outreach programs, OFP prides itself on providing a community in which all are welcomed, regardless of creed, background, or ability, and supported without discrimination. OFP has approximately 100 unionized employees.

Ottawa Rotary Home (ORH) supports children and adults living with developmental and other disabilities through respite, direct nursing, and residential services. The ORH exists to improve the quality of life of caregivers and individuals with disabilities through a family and person-centred approach that is responsive to individual needs and offered in a dynamic and flexible way. ORH has approximately 70 non-unionized staff, 2 locations, and over 250 clients.

Services Required

OSSO as part of its Service Level Agreement(s) with its customers is to provide efficient cost effective services to its founding members and clients. In the future, as OSSO brings on customers, we anticipate that some clients will require full or partial support using an Employee Management System encompassing, Human Resources, Scheduling and Payroll.

We are looking to work collaboratively with the successful consultant to:

a. Review of Existing Platforms:

Conduct a thorough review and analysis of the current scheduling, human resources, and payroll platforms in use at each of the listed organizations (see Appendix A). Platforms in use are used to process: all aspects of payroll, staff scheduling/staff replacement, and HR – including recruitment, onboarding, leave management, and employee record/management.

Identify the strengths, weaknesses, and limitations of each platform.

Evaluate the level of similarities & functionality between the existing systems.

b. Needs Assessment:

Engage with key stakeholders from each organization, including staff members and management, to understand their requirements and pain points.

Identify the specific needs of the organizations and their employment agreements.

Determine the critical functionalities required for an integrated scheduling, HR, and payroll system.

c. Vendor Evaluation:

Research and identify potential vendors capable of providing an existing integrated solution to meet the needs identified from the needs assessment.

Assess the suitability of each vendor's platform based on the identified needs and requirements.

Evaluate vendor capabilities, including system scalability, customization options, and support services.

d. Cost Analysis:

Provide a detailed cost analysis for the implementation and maintenance of the integrated system.

Include upfront costs, ongoing licensing fees, support charges, and any other relevant expenses.

Identify any potential cost savings and return on investment (ROI) associated with the new system.

e. Recommendations:

Present findings and recommendations based on the assessment/audit results.

Advise OSSO on whether a single platform can effectively streamline processes and meet the identified requirements.

Propose an implementation roadmap, including a draft RFP for a system that meets the needs of OSSO and its customers.

Current Environment

Appendix A has a summary of the current environment for each organization.

Submission Requirements and Timelines

Submission Format

Please keep proposals short (maximum ten pages), clear, and concise. Please include only the information that is required to address the questions included below.

Executive Summary

Provide a brief overview of the salient points of your bid

A. Corporate Experience, and Qualifications

Provide a brief overview of your organization, including:

- The type of organization (sole practitioner, corporation, etc.)
- A description of the services your organization provides
- Number of years the organization has been in business, as well as the number of years the organization has provided expertise in the services we are requesting

Methodology:

- Detailed description of the approach, tools, and techniques that will be used to conduct the assessment/audit.
- Description of how the consultant plans to engage with OSSO's staff and stakeholders.

Provide a brief description of your organization's experience at providing comparable services to similar organizations, with a specific focus on other community organizations, preferably not-for-profit and shared services organizations. Also, include any work with non-profit or broader public-sector clients. Please include your availability to commence this project in September 2023, delivering the final report no later than March 1, 2024.

B. Solution

Provide succinct, clear, and sufficient information for each of the following questions:

1. Describe your proposed approach and solution, taking into account what you know of our service needs and current state assets.
2. How will you work with us to plan out this project?
3. How do you foresee working with OSSO and its founding members?
4. How will you take a proactive approach to working with us?
5. How and when will you communicate with us if you are selected?
6. What are the benefits of selecting you as a consultant?
7. What would be your typical service levels for an arrangement like this?
8. What is the escalation process for any service problems?
9. What do you consider the main risks of this project, and how will you manage them?
10. Please outline any value-added approaches or services you (could) provide.

C. Pricing

The budget for this project is \$50,000

Submit pricing in a separate electronic file.

Include a detailed summary of estimated pricing. Include all information required for us to understand the Total Cost of the project. Please identify hours you anticipate spending on each phase of this project.

All rates shall be provided in Canadian Funds, inclusive of all applicable duties and fees, including HST if applicable.

D. References

Please provide three references for similar work for similar clients. For each reference, please provide:

- Client name
- Brief description of services provided
- Dates services provided
- Contact name and information

Timelines

Following are the RFP process dates

- RFI release date – Friday, June 23, 2023
- Deadline for questions – Tuesday, July 11, 2023
- Addenda deadline, including answers to questions submitted – Friday, July 7, 2023
- Responses due – 12:00 noon, Friday, August 11, 2023
- Selection Date – estimated decision August 15, 2023

Responses to all questions will be provided to each consultant. OSSO reserves the right to extend the timelines at any point in time and to ask follow-up questions to any of the competing consultants.

RFP Coordinator

We are aware that the vendors responding to this opportunity may have existing relationships with people at OSSO or the founding organizations. In order to maintain professionalism during this process, we request that all inquiries and communications related to the procurement and the procurement process are to be directed solely to the RFP Coordinator:

Nancy Worsfold

info@osso.org

343.633.4702 x200

Selection Criteria

We will evaluate the responses based on multiple criteria and will select the best overall solution to fit its needs. OSSO and its founding organizations are not obligated to select the lowest-priced bidder, or any bidder at this time. All responses will be evaluated in the following areas:

- Completeness of solution
- Expertise and experience
- Value-added services
- Demonstrated customer service quality and support
- Previous relevant experience
- Financial considerations

- References

Appendix A: Summary of Environment and Assets

OCL – (Ottawa-Carleton Lifeskills) Overview

Current Provider(s)

ComVida EMS – Scheduling, Human Resources and Payroll functionality
ShareVision – some HR, posting management, leave management, training
Indeed

OFP – Ottawa Foyers Partage – Overview

Current Provider(s)

Inclusion – Scheduling – some HR, and payroll
ShareVision – Human Resources, some posting management
Indeed

ORH – Ottawa Rotary Home – Overview

Current Provider(s)

Go Easy Care – scheduling and payroll
ShareVision & Sharepoint – Human Resource Management
Indeed

OSSO – Ottawa Shared Services Organization – Overview

Current Provider(s)

ComVida – Human Resources, Payroll, Scheduling (leave management)
Indeed

Not part of the evaluation process.

Clients

Tamir

ComVida CVC

Y's Owl Maclure Co-operative Centre

ComVida CVC

Confidentiality

Due to the nature of this project you may have access to information that is confidential & or private. The selected consultant will be expected to sign a confidentiality agreement.

CONFIDENTIALITY AGREEMENT

This Confidentiality Agreement ("Agreement") is entered into by and between Ottawa Shared Services Organization ("Disclosing Party") and [Selected Consultant/Consulting Firm Name] ("Receiving Party") in relation to the services provided during the consulting process.

Purpose: The purpose of this Agreement is to protect the confidential information shared by the Disclosing Party during the consulting process and to ensure that the Receiving Party maintains the confidentiality of such information.

Definition of Confidential Information: Confidential Information refers to any non-public, proprietary, or sensitive information disclosed by the Disclosing Party during the consulting process, including but not limited to project details, financial information, trade secrets, intellectual property, and any other private information marked or designated as confidential or covered under privacy legislation.

Obligations of the Receiving Party: The Receiving Party agrees to:

- a. Maintain Confidentiality: The Receiving Party shall keep all Confidential Information received from the Disclosing Party strictly confidential and shall not disclose, publish, or disseminate such information to any third party without the prior written consent of the Disclosing Party.
- b. Use of Confidential Information: The Receiving Party shall only use the Confidential Information for the purpose of evaluating and preparing a proposal in response to the RFP and shall not use it for any other purpose without the explicit written consent of the Disclosing Party.
- c. Protection of Confidential Information: The Receiving Party shall take all necessary measures to protect the Confidential Information from unauthorized access, use, or disclosure. This includes implementing appropriate security measures, such as password protection, encryption, and restricted access.
- d. Limitation on Disclosure: The Receiving Party shall only disclose the Confidential Information to its employees, subcontractors, or agents on a need-to-know basis and under the condition that they are bound by similar confidentiality obligations.

Return of Confidential Information: Upon request by the Disclosing Party or upon termination of this Agreement, the Receiving Party shall promptly return or destroy all Confidential Information in its possession, including any copies or reproductions thereof, and provide written certification of such return or destruction.

Remedies: The Receiving Party acknowledges that any breach of this Agreement may cause irreparable harm to the Disclosing Party. In the event of a breach or threatened breach, the Disclosing Party shall be entitled to seek injunctive relief, in addition to any other legal remedies available.

Term and Termination: This Agreement shall remain in effect for the duration of the consulting process and shall survive the conclusion or termination of the process.

Governing Law and Jurisdiction: This Agreement shall be governed by and construed in accordance with all applicable privacy laws.

Appendix B

Questions and responses from July 11, 2023 deadline

Question and Answers from Potential Vendors

1. Are you open to a shorter timeframe for this engagement which would include the full scope as noted?

Yes if the capacity to do so can be demonstrated

2. Do you have a target timeline for solution implementation?

Our goal is to commence a staggered implementation after April 1, 2024

3. Do you have anticipated timeline for growth in terms of your existing client base?

We have anticipated steady but slow growth year over year - at most one full service

1. Are OSSO's existing IT support firms (the one for OCL and OFP, plus ORH's) allowed to
2. is requirement "d. Cost Analysis:" on pages 3 and 4 related to the potential single vendors? In other words, a cost comparison of the potential vendors?

Yes.

Yes, it will be a high level comparison of potential vendors

3. Am I able to use the successful procurement of IT support for OSSO previously as a reference?

Yes.

1. Will you be able to answer questions one at a time, or as a group (i.e. wait until the last day to answer everyone at the same time)?

They will be posted together

2. Will you be providing a list of firms that will be submitting a proposal?

No.

1. The RFP asks for recommendations including an implementation roadmap. Is the vendor who wins this contract also eligible to compete for and subsequently deliver the solution(s) as an implementation partner in future phases of this work?

Yes, as long as there is not a conflict of interest.

2. Which organization(s) will serve as primary sponsor for this project? What is the project's governance structure, and who is the key audience and decision-maker for the project and its recommendations?

OSSO is the primary sponsor. There is steering committee representing the founding members. The founding members are the key audience.

3. Please provide the organization chart for each organization involved including the number of staff in each position. This will assist in determining the scope and depth of consultation with key stakeholders representing each organization.

Yes we can pending agreement from founding organizations.

4. Will staff from the three shared service organizations be available to contribute to the information gathering phase?

Yes.

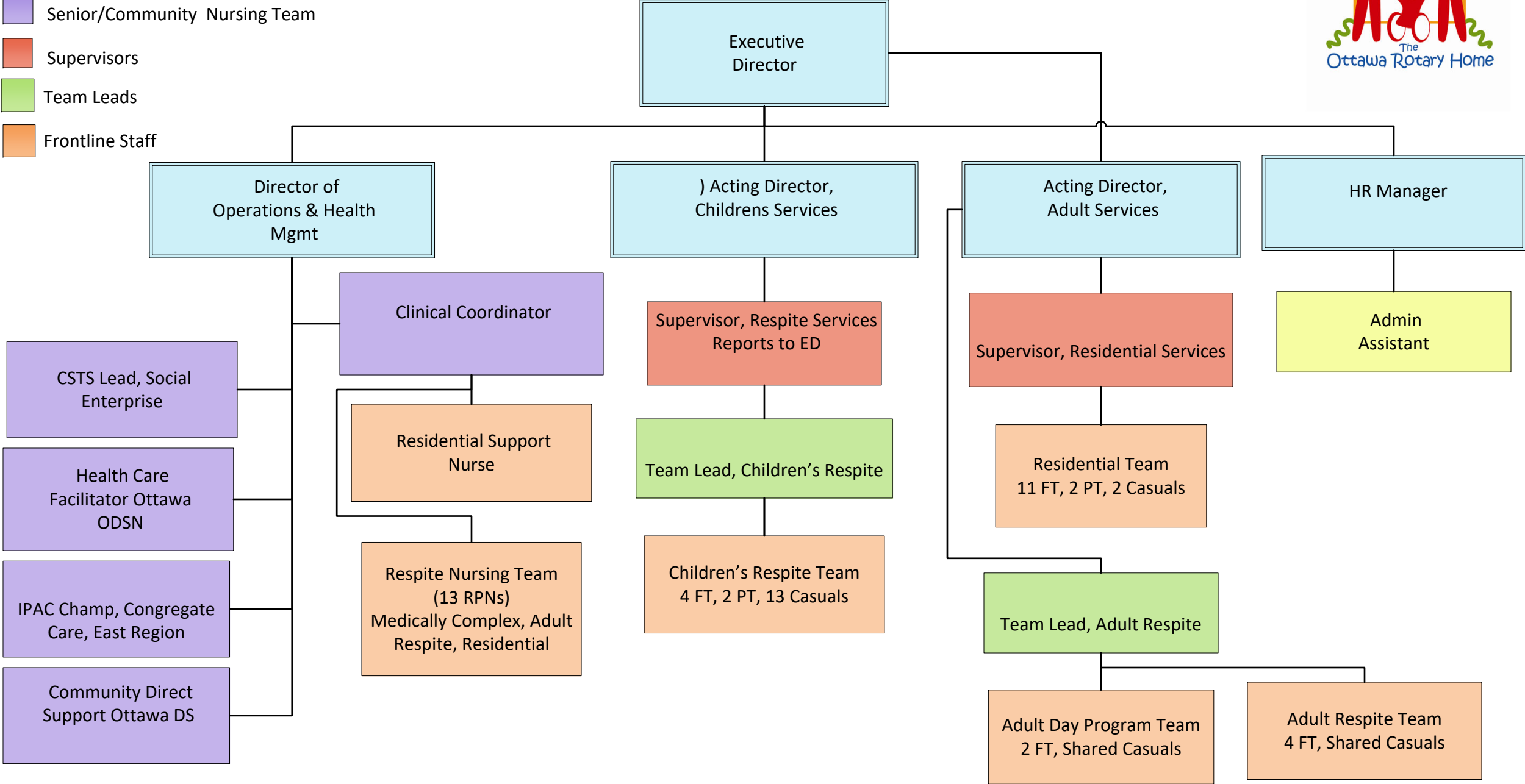
Question and Answers from Potential Vendors

5. What was the primary pressure point or factor that resulted in the decision to found OSSO?	Changes to the sector, Ministry funding, and the Ministry's policy indicating their intention for change. OSSO was created to assure long-term sustainability by creating efficiencies. It also is intended to allow the founding members to focus on clients
6. What is OSSO's strategic plan for growth and does the plan include incorporating more organizations onto this single platform or solution?	We have anticipated steady but slow growth year over year - at most one full service client in 2024
7. Are there currently any business processes that have been streamlined already between the three agencies and if so, which ones, and with what solution?	All organizations have aligned their financial chart of accounts and moved to Sage 300.

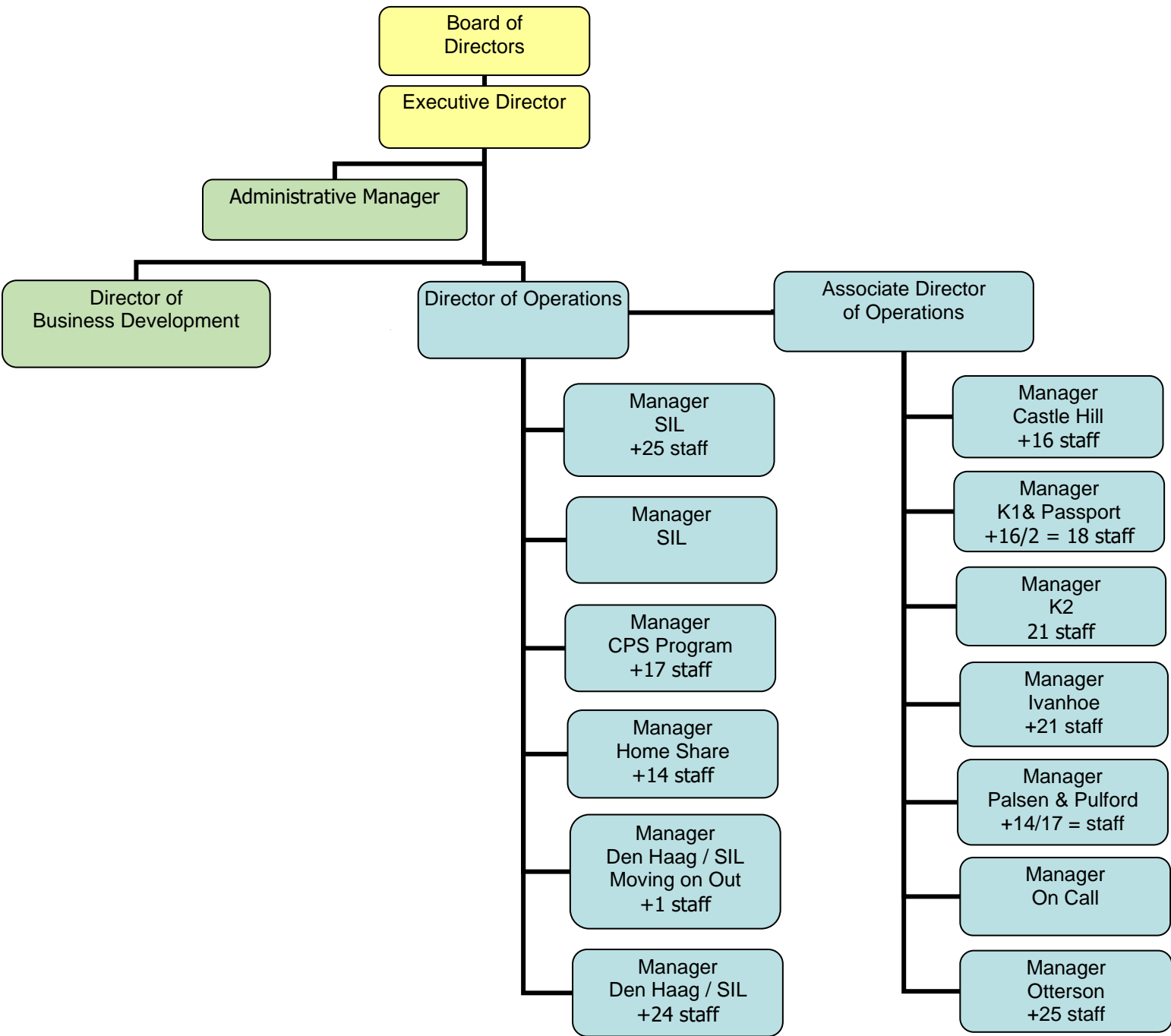
The Ottawa Rotary Home Organizational Chart



- Executive Team
- Support Staff
- Senior/Community Nursing Team
- Supervisors
- Team Leads
- Frontline Staff

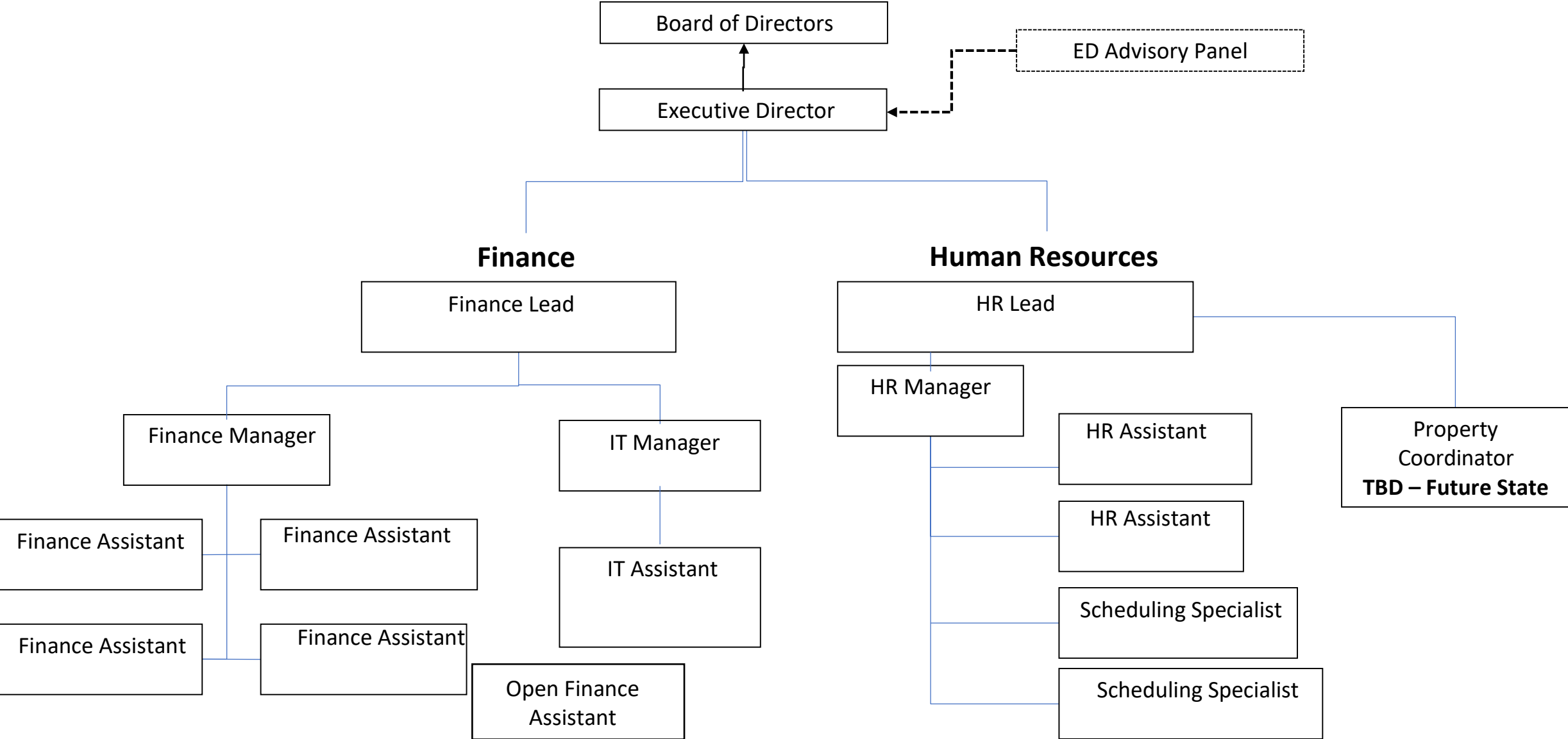


**OTTAWA-CARLETON LIFESKILLS INC.
ORGANIZATION CHART – June 1, 2023**



Ottawa Shared Services Organization (OSSO)

July 2023



OTTAWA FOYERS PARTAGE MANAGEMENT STRUCTURE

