



**2024 Operational Transformation Review  
REQUEST FOR PROPOSAL**

King's University College  
266 Epworth Ave  
London, ON  
N6A 2M3

# **INSTRUCTIONS TO BIDDERS**

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## **1. Summary**

This document requests bids for an operational transformation review at King's University College (hereby referred to as "King's").

The 2024 Operational Transformation Review Selection Committee (hereby referred to as "the Committee") will be made up of King's administrators and operational staff with responsibilities related to this area.

## **2. Bid Submissions**

King's is committed to equity and diversity and encourages applications from all qualified Bidders including women, members of visible minorities, aboriginal persons and persons with disabilities.

To receive consideration, bids must be submitted in accordance with the following instructions. Failure to comply with these instructions will result in the bid being disqualified.

The Request for Proposal Form and Schedule B (Bidder References) must be included in the bid submission. There shall be no alteration of or changes made to the Form or Schedule. Any alterations made to the Form or Schedule, other than the supply of the required information, may result in the bid being declared non-compliant and rejected without further consideration.

All bids must be emailed by the date/time outlined in Schedule A to Tiffany Chisholm, Purchasing Services Coordinator at [tiffany.chisholm@kings.uwo.ca](mailto:tiffany.chisholm@kings.uwo.ca) with a subject line containing "Operational Transformation Review RFP" and the name of the Bidder.

King's is not responsible for the timeliness of documents emailed nor will King's accept any bid emailed to an email address other than the specified email address above. King's is neither liable nor responsible for any costs incurred by a Bidder in the preparation, submission, or presentation of their bid to this RFP.

Bidders are advised that it is not permissible to send a copy(s) of a response to any employee, consultant, agent, volunteer or business employed or working on behalf of King's or involved in this process, and King's will reject without further consideration any response so delivered.

All documents related to the bid become the property of King's. All information, data, recommendations and reports resulting from the project become the property of King's.

## **3. Inquiries**

Bidders having any questions or requiring clarification of the intent or meaning of any part thereof shall notify Tiffany Chisholm by email ([tiffany.chisholm@kings.uwo.ca](mailto:tiffany.chisholm@kings.uwo.ca)) by the deadline for submission of questions as outlined in Schedule A.

## **4. Communication of all RFP documents**

The original RFP document will be posted on Biddingo and the King's website.

If it becomes necessary to revise any part of this RFP, addenda and amendments will be posted solely on the King's website <https://www.kings.uwo.ca/about-kings/facts-and-information/administrative-departments/finance/rfp/>.

For RFP's valued \$100,000 or more, the award notice will be posted solely on Biddingo.

It is the sole responsibility of each potential bidder to check the King's website for any/all changes to the original RFP document, as these will become part of the RFP specifications.

## **5. Assessment of Response**

All bids will be opened in private. The Committee will evaluate the bids based on the pre-determined evaluation criteria outlined in Attachment 1.

As the Committee evaluates the bids, decisions will be based on the contents of the bid as submitted. Each Bidder shall include any and all information required as outlined in Attachment 2. It shall be explicitly understood that there shall be no opportunity to make any material change to the bid, including any alteration, addition or deletion of any element within the bid as submitted based on dates outlined in Schedule A. Information submitted independent of the response document or after closing will not be considered by the Committee.

King's may seek clarifications from a Bidder after the closing date. Clarification questions will be submitted to the Bidder in writing. Answers to the written clarification questions must be returned to King's in writing. The intent of the clarification is simply to obtain further explanation and understanding of what was intended by the Bidder. A clarification shall not provide an opportunity to make any material changes to the original bid, including any alteration, addition or deletion of any element of the original bid.

## **6. Bid Acceptance/Rejection**

No action by King's or the Committee implied or otherwise, shall be construed as acceptance to this RFP.

King's reserves the right to accept any bid (in whole, or a portion thereof) which may be deemed to be most advantageous to King's, or to reject any or all bids. Although King's would like to award this contract to one Bidder, it realizes that it may not be in King's best interest to do so. Bidders shall highlight in the bid any cost or operational advantages of awarding all service requests to one Bidder.

King's may declare, at its sole and unfettered discretion, any bid to be non-compliant, and reject without further consideration if it:

- is informal, incomplete, unqualified, or otherwise irregular in any way;
- is not legible, is not dated, is not executed in the legal registered name of the entity, is not signed by authorized officials, and/or does not acknowledge all addenda that may have been issued;
- is submitted without the required materials (eg. Request for Proposal Form);
- is submitted without first having attended a mandatory site visit (if applicable);
- does not provide the information called for in the RFP documents as outlined in Attachment 2;
- does not contain sufficient information for the Committee to evaluate the Bid based on the evaluation criteria contained in Attachment 1.

King's, at its sole and unfettered discretion, may reject without further consideration any response where the Bidder, a member of the Bidder's team, an employee, shareholder, director, officer, partner or person otherwise associated with the Bidder:

- has now or has in the past, unsatisfactorily performed work for King's or had an unsatisfactory relationship with King's, by contract or otherwise, in the sole opinion of King's;
- has a contract with King's which in the sole opinion of King's, is not in good standing or has had a contract terminated by King's for non-performance;
- is engaged in a substantially unresolved dispute or is in litigation with King's or has a claim or judgment arising from litigation;

- has been charged or convicted of an offence with regard to a business enterprise which has or may have an impact upon King's;
- is considered to have a conflict of interest, in the sole opinion of King's.

## **7. Invoicing and Payment**

King's standard payment policy is net 30 days following receipt of invoice and sign-off by the responsible department or faculty. Final payment terms will be negotiated between the successful Bidder (if any), and King's prior to contract signing.

## **8. Debriefing (applies to RFP valued \$100,000 or more)**

The successful Bidder(s) will be notified of their success according to the Notification to Successful Bidder timeline in Schedule A. After this date, and within sixty (60) days, Bidders may request a debriefing, in writing, by emailing Tiffany Chisholm at [tiffany.chisholm@kings.uwo.ca](mailto:tiffany.chisholm@kings.uwo.ca). The intent of the debriefing information session is to aid the Bidder in presenting a better proposal in subsequent procurement opportunities. Any debriefing provided is not for the purpose of providing an opportunity to challenge the procurement process.

## **9. Confidentiality**

The successful Bidder (and employees) may be required to sign an agreement of confidentiality with regard to information that is proprietary to King's.

## **10. Accessibility**

King's is committed to recognizing the dignity and independence of all and seeks to ensure that persons with disabilities have genuine, open and unhindered access to the College's RFP opportunities. If you require an accommodation during the RFP process, please contact Tiffany Chisholm at [tiffany.chisholm@kings.uwo.ca](mailto:tiffany.chisholm@kings.uwo.ca) or 519-433-3491 for assistance.

As outlined in the Ontario Regulation 429-07, Accessibility for Ontarians with Disability Act, 2005, King's will incorporate accessibility criteria and features when procuring, goods, services and facilities, except where it is not practical to do so.

The Bidder will respect the dignity and independence of persons with disabilities in accordance with the Accessibility Standards for Integrated Accessibility Standards O. Reg. 191/11, s. 5 (1); O. Reg. 413/12, s. 4 (1) developed under the Accessibility for Ontarians with Disabilities Act, 2005.

*End of Instructions to Bidders*

## REQUEST FOR PROPOSAL FORM

Bidder Identity	
Full Legal Registered Name	
Any Other Relevant Name	
Year Established	
Head Office Address	
Phone Number	
Type of Entity	<input type="checkbox"/> Corporation <input type="checkbox"/> Unregistered Partnership <input type="checkbox"/> Registered Partnership <input type="checkbox"/> Proprietorship <input type="checkbox"/> Registered Joint Venture <input type="checkbox"/> Unregistered Joint Venture <input type="checkbox"/> Other. Explain:
Number of Employees	

We the undersigned, having examined the Operational Transformation Review RFP documents (including any and all addenda and amendments), and are satisfied that we understand the services as identified. We further acknowledge that we have not relied on the completeness of such information and declare ourselves competent to undertake and complete the services and do hereby irrevocably propose and agree to carry out the services outlined in Attachment 2. We hereby certify that we have no conflict of interest in submitting this bid. We acknowledge that the below has been included as part of this bid:

- Request for Proposal Form
- Schedule B – Bidder References
- Submission in the format outlined in Schedule C
- Any and all addenda and amendments

We hereby certify that we have no conflict of interest in submitting this bid. For the purposes of this section, the term “Conflict of Interest” means in relation to the RFP process, the Bidder has an unfair advantage or engages in conduct, directly or indirectly, that may give it an unfair advantage, including but not limited to:

- (i) having or having access to confidential information of King’s in the preparation of its proposal that is not available to other Bidders;
- (ii) communicating with any person with a view to influencing preferred treatment in the RFP process (including but not limited to the lobbying of decision makers involved in the RFP process); or
- (iii) engaging in conduct that compromises or could be seen to compromise the integrity of the RFP process.

If the below box is left blank, the Bidder will be deemed to declare that:

- (1) there was no Conflict of Interest in preparing its proposal and
  - (2) there is no foreseeable Conflict of Interest in performing the contractual obligations contemplated in the RFP.
- Otherwise, if the statement below applies, check the box.

- The Bidder declares that there is an actual or potential Conflict of Interest relating to the preparation of its proposal and/or the Bidder foresees an actual or potential Conflict of Interest in performing the contractual obligations contemplated in the RFP

If the Bidder declares an actual or potential Conflict of Interest by marking the box above, the Bidder must set out below details of the actual or potential Conflict of Interest:

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The undersigned hereby represents and warrants as to having authority to execute the document on behalf of the Bidder.

Name of Authorized Officer(s): \_\_\_\_\_

Position(s): \_\_\_\_\_

Signature(s): \_\_\_\_\_

Executed this \_\_\_\_ day of \_\_\_\_\_, 2024.

**This form MUST be signed and dated to be considered a valid bid.**

*End of Request For Proposal Form*

## **SCHEDULE A – TARGET DATES**

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King's has identified the following project target dates:

<b>Activity</b>	<b>Target Date</b>
RFP Issued	May 13, 2024
Deadline for Questions/Clarifications on RFP	May 24, 2024
Deadline for Answers/Clarifications on RFP	May 31, 2024
Closing Date: RFP Submissions Due	June 10, 2024 @ 4:30pm
RFP Review Period	June 10-14, 2024
Notification of Short Listed Bidders	June 17, 2024
Presentations/Interviews of Short Listed Bidders	June 24 - 25, 2024
Committee Deliberations	June 25, 2024
Notification to Successful Bidder	June 26, 2024
Contract Development	June 26 - July 2, 2024
Start of Operations	July 8, 2024
Completion of Project	November 8, 2024

*End of Schedule A*

**SCHEDULE B – BIDDER REFERENCES**

Bidders must provide three (3) references from clients who have obtained similar services in the last three (5) years. References should be external to King’s and should include (but are not limited to) experiences in post-secondary institutions. King’s reserves the right to conduct reference checks using the below contact information. Bidders may recreate this chart to ensure adequate space for requested information, but the chart must include the below titles.

<b>Bidder Reference #1</b>	
Company Name	
Company Address	
Contact Name	
Contact Phone Number	
Contact Email Address	
Scope of Services Provided	
Date and Duration of Assignment	
Outcomes including (but not limited to): recommendations provided, changes implemented, indicators of success, reasons for failure	

<b>Bidder Reference #2</b>	
Company Name	
Company Address	
Contact Name	
Contact Phone Number	
Contact Email Address	
Scope of Services Provided	
Date and Duration of Assignment	
Outcomes including (but not limited to): recommendations provided, changes implemented, indicators of success, reasons for failure	

<b>Bidder Reference #3</b>	
Company Name	
Company Address	
Contact Name	
Contact Phone Number	
Contact Email Address	
Scope of Services Provided	
Date and Duration of Assignment	
Outcomes including (but not limited to): recommendations provided, changes implemented, indicators of success, reasons for failure	

*End of Schedule B*



## **SCHEDULE C – SUBMISSION REQUIREMENTS**

Each Bidder will prepare and submit a Technical Submission consisting of the following:

### **Executive Summary** (maximum 2 pages):

- The Bidders understanding of the full scope of services required.
- An outline statement with description of the intended approach and methodology to be pursued for the provision of the services identified.
- Any potential exclusions.
- Confirm the availability of the Bidder and the commitment of appropriate resources to complete the project.

### **Prime Consultant Company Profile** (maximum 1 page)

- Introduction and overview of the company.
- Years currently in business and depth of knowledge and experience.

### **Proposed Team and Availability** (max. 6 pages excluding resumes):

- List the key project personnel who will form part of the Bidders project team including all subconsultants.
- Describe how project communication will flow
- Describe individual capabilities, qualifications, relevant experience and roles for all team members assigned to this project.
- Confirm availability and commitment of the team to complete the project on time.

### **Schedule, Work Plan, Approach and Methodology** (maximum 7 pages)

- Provide a complete proposed schedule for the project.
- Explain the method and approach with respect to the management of client meetings, communications, approvals and schedules.
- Describe how your team's approach to the project best reflects best practices in establishing and maintaining all operational functions.
- Describe the team's availability to commence work on the services immediately upon award of the contract and maintain the required levels of service in order to meet the project schedule.
- Describe your understanding of the assignment, including overall scope and objectives, noting any specific issues that may require extraordinary attention.
- Confirm understanding and delivery of the project scope as described in Attachment 2

### **Proposed Fee** (maximum 3 pages)

- Specify an all-inclusive professional services fee (in Canadian dollars before taxes), which will include the cost of all disbursements necessary to complete the project. This shall include a fee structure, setting out the estimated particulars that comprise the proposed fees. Disbursements shall include but shall not be limited to: accommodation, travel, communication costs, printing, photocopying, reproduction or transmission of information in an electronic format, and all overhead costs related to the provision of services. Other disbursement costs additional to the Bidders fee proposal will not be permitted. The all-inclusive fee shall include the cost of services and disbursements of all sub consultants retained by the successful Bidder in the completion of the project. Hospitality, incidental or food expenses are not considered allowable expenses. Travel and accommodations are acceptable.
- Describe how the Bidder proposes to deal with additional fees related to changes to the contract that may be required due to errors or omissions.

- Hourly Rates: Provide hourly rates (all-inclusive of burdens and overhead and profit) for each of the team members identified in the project team.
- Recommend a phased approach where the Bidder proposed schedule is broken into phases of the Bidder's choice. Identify the cost for each phase.

In addition to the above, the Bid must include:

- Request for Proposal Form
- Schedule B – Bidder References

*End of Schedule C*

## **ATTACHMENT 1 – EVALUATION CRITERIA/SUBMISSION REQUIREMENTS**

Evaluation of qualified bids will be undertaken by the Committee using the below stated evaluation criteria. Bidders are responsible for reviewing the evaluation criteria and providing appropriate and sufficient information to enable the Committee to accurately assess the bid.

Each bid will be rated on a scale of 1-10 (1 = poor, 10 = excellent) by the Committee members. An average of the ratings will determine the final rankings as a tool contributing to overall assessment of RFP submissions. The rating will not be the sole determining factor in the final decision. The Committee will make the final determination in the best interest of King's.

Bids will be evaluated on many criteria deemed to be in the best interest of King's, including, but not limited to:

- Proposed Fee as outlined in Schedule C;
- General (presentation, aesthetics, flow, max number of pages adhered);
- Executive Summary and Company Profile;
- Proposed Team and Availability;
- Capability, past experience and qualifications of the proposed team;
- Schedule, work plan, approach, and methodology and ability to meet timelines outlined in Schedule A;
- Verification of references supplied by the bidder, if necessary;
- A clear understanding of the requirements as outlined in this RFP;
- The Bidder's willingness to following the invoicing and payment standards as outlined in section 7 of the RFP document.

*End of Attachment 1*

## **ATTACHMENT 2 – SCOPE OF OPPORTUNITY**

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### **Objective**

The objective of the operational review is to inform the development and implementation of a multi-year operational transformation plan to modernize Kings business and operating model. King's desires to modernize its operations and organizational structure to proactively support and sustain its Catholic mission and its role as a small liberal arts university and to prepare Kings for the future.

### **Deliverables**

- Assessment of the strategies, service delivery models, structures, processes, systems and capabilities for the key administrative functions within the university;
- Development of recommendations for an institution-wide operational transformation program;
- A preliminary implementation approach and plan to implement the recommendations.

### **Scope**

To include, but not necessarily limited to, a review of:

- Internal operations, risk and compliance;
- Finance including an assessment of operational efficiency, and a review of current resource allocations in relation to board approved priorities;
- Revenue generation opportunities;
- Information technology systems and reporting; human resources; physical infrastructure, strategic enrolment management;
- Policies and procedures in order to recommend any necessary changes to structure, processes, procedures and policies to ensure that best practices are established and maintained in all operational functions;
- This may include recommendations for build out of key functions to ensure the necessary controls and operational processes to drive continued future financial sustainability; and
- Identify opportunities to incorporate a continuous improvement mindset and process aimed at ensuring that Kings sustain the transformation by benchmarking and adopting best practice across all areas.

*End of Attachment 2*