



**Application Guidelines**

**Request for Proposals (RFP)  
For Independent Contractors Opportunity for:**

**Professional Services: Financial Education Consultant  
For: Leadership and Financial Services Connections**

**Term:  
May 1, 2019 to March 31, 2020**

**Project Based Contract**

**Issued: March 12, 2019**

**Application Deadline: March 31, 2019, 5:00 pm**

## **PART 1 – PURPOSE:**

ACCES Employment is currently seeking a Financial Education Consultant to deliver workshops on the Canadian Economy in the Leadership and Financial Connections program.

Also, the Financial Education Consultant will deliver Investments Funds in Canada (IFC) course exam preparation workshops to Financial Services Connections clients to successfully pass the IFC exam

Those applying must be available in Scarborough, Toronto and Peel to teach between 9:00 am and 8:00 pm Eastern Time according to program schedules.

Interested parties are asked to read this RFP carefully and are invited to submit a proposal in accordance with **PART 4 – HOW TO APPLY**.

For information on ACCES Employment, please refer to **Appendix A – About ACCES Employment**.

## **PART 2 – SCOPE OF SERVICES / DELIVERABLES:**

1. Provide three and a half (3.5) hours of instruction in (1) one day on the Canadian Economy workshop for the ACCES Employment Leadership Connections (LC) and Financial Services Connection (FSC) Bridging Programs for a total of twelve (12) cohorts per year.
2. Provide instruction in three (3) days at six (6) hours per day investments Funds in Canada (IFC) course exam preparation workshops for the ACCES Employment FSC bridging program for a total of four (4) sessions per year.
3. Deliver training at the ACCES Toronto, Mississauga, Brampton and Scarborough.
4. Work closely with ACCES FSC staff to facilitate the workshops; respond to program questions and enquires within 48 hours.
5. Provide a detailed course outline complete with learning outcomes and a schedule
6. Adjust the material as necessary to address client requests and to accommodate learner's needs, priorities, and level of comprehension
7. It is the responsibility of the contractor to contact ACCES Main Contact and inform him/her of any absences at least 48 hours prior to the commencement of the scheduled work so that a replacement or rearrangements can be made.

## **PART 3 – QUALIFICATIONS:**

### **Qualifications / Experience:**

1. B.A. or equivalent in relevant field

2. Knowledge of the structure of Canadian Financial organizations
3. Knowledge of IFC examination and study material
4. Knowledge of Canadian trends in economy and industry
5. Knowledge of Adult Education Principles
6. Demonstrated experience working adults of diverse cultural backgrounds
7. Knowledge of integration issues faced by newcomers including job search techniques and leads, labour market information, employment related vocabulary, and professional terminology
8. Highly proficient computer skills with knowledge of MS Office ( word, PowerPoint and excel) the internet and email communication

#### **PART 4 – HOW TO APPLY:**

All applications must:

- Enclose a Curriculum Vitae (CV)
- Enclose a cover letter outlining your relevant qualifications and professional experiences
- Include a proposal/project plan that would detail how you would provide the instructional design, stakeholder coordination and subject matter expertise necessary to complete the work described in Part 2 above.
- Provide a rate/fee schedule, including HST number
- Include a minimum of two professional references
- Please indicate which program of interest in the subject line

Submit applications by **Sunday, March 31, 2019 at 5pm** via email, fax or mail to

**Selection Committee  
ACCES Employment  
Re.: Financial Education Consultant – Leadership & Financial  
Services Connections programs  
489 College Street, Suite 100  
Toronto, ON M6G 1A5  
Fax: 416-664-6364  
E-mail: [hr@acesemployment.ca](mailto:hr@acesemployment.ca)**

**Please Note:**

- In order to be fair to all proponents, late submissions and phone calls or e-mails to discuss the applications status will not be accepted. Only shortlisted applicants (individuals/organizations) will be contacted.
- All applicants will be notified of the status of their application.

- **The inclusion of HST number is mandatory.**
- **As a Broader Public Sector (BPS) agency, ACCES Employment is unable to reimburse any hospitality, incidental, food, travel and other expenses.**

**PART 5 - EVALUATION OF PROPOSALS:**

**5.1 Stages and Evaluation Point Allocation:**

**5.2 Stage I - Review of Mandatory Requirements (Pass/Fail):**

Any Proposal that is not considered by ACCES Employment to meet all mandatory requirements will be disqualified and not evaluated further.

A Proposal must include the following **Mandatory Requirements:**

1. Complete and submit **Appendix B - Conflict of Interest Statement.**
2. Complete and submit **Appendix C – References**, including 2 (two) references from comparable clients served within the past 3 years (of similar size and scope, if possible).

***If proponent does not meet these mandatory requirements, the proponent’s submission will be deemed to be non-eligible and will be eliminated from further consideration.***

**5.3 Stage II – Rated Requirements (15 Points):**

During Stage II, Proposals will be evaluated and scored on the basis of the rated requirements. The maximum points allocated for Stage II is 15 points. Any Proposal that **does not** include satisfactory responses to applicable rated requirements as described in **Part 2 and Part 3** of this document will **fail** and not proceed further. Only the top scoring proponents will be invited to deliver in person, or by conference call, presentations to the ACCES Employment Selection Committee. Each Proposal will be awarded points based on the Proponent’s response to the information listed below:

<b>Rated requirements</b>	<b>Maximum Points</b>
Enclosed CV and Cover Letter	1
Enclosed Project Plan or Proposal	1
Quote based on an hourly rate	2
Three Professional References	1
<b>Background / Professional Capacity / Qualifications</b>	
Qualifications and Experience	5
Strength of Project Plan or Proposal	5

<b>Total Score for Rated Requirements</b>	15
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**PART 6 – KEY DATES:**

<b>Issue date</b>	March 13, 2019
<b>Addenda, if any</b>	Not Applicable
<b>Proposals submission deadline</b>	March 31, 2019
<b>Review/Selection Period</b>	April 1 - 5, 2019
<b>ACCES Employment Selection Committee to conduct in person interviews with the top proponents</b>	April 8 - 12, 2019
<b>Appointment of Vendor / Signing of Contract</b>	April 15, 2019
<b>Notification to Proponent's Proposal Status</b>	April 17, 2019

**PART 7 – ADDITIONAL INFORMATION:**

**7.1 ACCES Employment is not Committed to Proponent's Expenses:**

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

**7.2 Distribution of the Request for Proposals (RFP):**

This RFP has been released by notice to a minimum of 3 (three) potential applicants as identified by ACCES Employment.

Please be advised that successful Proponents will be required to:

- a) provide the services for a defined period of time;
- b) provide invoices to ACCES Employment on account of their services, accordingly;
- c) provide ACCES Employment with an HST number for their business; and
- d) report their income and directly remit the payment of all taxes or payments assessed or levied against or in respect of their business, including income tax, Canada Pension Plan, and all

other premiums or levies required by law to the appropriate Government Agency

- e) Provide proof of Liability Insurance and/or WSIB upon the request of ACCES Employment

**7.3 Distribution of the Request for Proposals (RFP):**

This RFP has been released:

- by notice to a broad spectrum potential applicants as identified by ACCES
- by publication on ACCES's website
- by publication on Settlementatwork.org's website

**7.4 External Factors:**

ACCES Employment reserves the right to withdraw this RFP or terminate the resulting contract within the terms of the contract without penalty. ACCES Employment programs and services receive funding from various sources and therefore all contracted services are subject to budget constraints.

## **Appendix A – About ACCES Employment**

### **ACCES Guiding Principles**

#### **Our Vision**

A fully inclusive labour force that reflects the diversity, skills and experience of Canada's population.

#### **Our Mission**

ACCES assists job seekers from diverse backgrounds who are facing barriers to employment, to integrate into the Canadian job market. We achieve this by providing employment services, linking employers to skilled people and building strong networks in collaboration with community partners.

#### **Our Values**

We value and respect the uniqueness of each individual, including our clients, our employers, our community partners and ourselves. We strive to provide every person with Customer Service Excellence and an exceptional customer experience.  
**Inclusive** - We are committed to respecting individual differences and being accessible to all those we serve. ACCES staff reflects the diversity of our community.

**Accountable** - We provide transparent, high quality services, and achieve results that are measurable and fiscally responsible.

**Client Focused** - Our services are customized to meet the needs of our clients, communities and employers.

**Collaborative** - We work together to achieve our goals and respect the contributions of others, both within ACCES and with our stakeholders.

**Learning** - We listen and stay connected to our communities, clients, employers and other partners, to continuously improve.

**Entrepreneurial** - We seek new, innovative and creative opportunities to be a leading-edge organization.

**Responsive** - We are flexible and embrace change, continuously adapting to emerging needs and opportunities within a dynamic environment.

**Results-Oriented** - We focus on action, outcomes, and setting new standards of excellence.

## **Background**

For more than 30 years, ACCES Employment has connected diverse job seekers with employers across the Greater Toronto Area. In 2017-2018, we served over 34,000 job seekers by providing them with high quality employment services both in-person and online. To facilitate strong employed outcomes for our clients we have well established connections with over 2,000 employers across the country. As a non-profit, charitable organization, ACCES Employment receives funding from all three levels of government, corporate sponsors, donors and United Way Greater Toronto.

ACCES has a diverse staff team of almost 200 employees who speak over 40 languages. We have six locations across the GTA, in Toronto, Brampton, Mississauga, North York Scarborough and Markham (opening soon).

ACCES Employment supports the success of women in the workplace through all of our programs. We recognize both the unique strengths that they offer and the barriers that they face to finding employment. We have developed two programs that assist women with achieving career success in Canada. The START Customer Care program is designed to support immigrant women with pursuing careers in the customer care sector in Canada. Empowering Women is an intensive program supporting newcomer women with successfully securing professional positions in their field. Through customized workshops, coaching, and mentorship, Empowering Women provide newcomer women with the skills and confidence to become a leader in their sector.

Our Employment Connections for Newcomer Youth helps refugees between the ages of 16 and 29 to find work in their field. We also have a program for newcomers and refugees with a background in trades called the Construction Trades Program.

We currently offer an online pre-arrival program Canadian Employment Connections designed to support those who are approved for permanent residency in Canada. Job seekers access a range of workshops, events and resources entirely online with virtual support from a team in Canada. We also offer a regular calendar of online events as well as an online resource hub – e-ACCES – that features articles, quick resources and online tools to help jobseekers.

We are constantly striving to improve our flexible and seamless services so that we can meet the needs of our participants. Staff is informed, highly skilled, creative, adaptable, and strongly committed to service excellence.

For additional information about our services, please visit our website at [www.accesemployment.ca](http://www.accesemployment.ca).

**Appendix B – Conflict of Interest Statement**

In addition to the other information and representations made by each Proponent in the RFP, each Proponent must declare whether it has an actual or potential Conflict of Interest. If, at the sole and absolute discretion of ACCES Employment, the Proponent is found to be in a Conflict of Interest, ACCES Employment may, in addition to any other remedies available at law or in equity, disqualify the Proposal submitted by the Proponent.

The Proponent, by submitting the Proposal, warrants that to its best knowledge and belief no actual or potential Conflict of Interest exists with respect to the submission of the Proposal or performance of the contemplated Agreement other than those disclosed in the Form of Offer. Where ACCES Employment discovers a Proponent’s failure to disclose all actual or potential Conflicts of Interest, ACCES Employment may disqualify the Proponent or terminate any Agreement awarded to that Proponent pursuant to this Proposal process.

<b>Conflict of Interest</b>	<b>Response</b>
Is there an actual Conflict of Interest, relating to the preparation of its Proposal, or if the Proponent foresees an actual or potential Conflict of Interest in performing the contractual obligations contemplated in the RFP?	<input type="checkbox"/> Yes <input type="checkbox"/> No [If yes, please enter details here.]

The Proponent agrees to provide any additional information, which may be requested by ACCES Employment.

**Appendix C – References**

Reference Number 1:

Company Name:	
Contact Name:	
Company Address:	
Company Telephone Number:	
Contact Email Address:	
Date Work Undertaken:	From: To:
Nature of Services:	

Reference Number 2:

Company Name:	
Contact Name:	

Company Address:	
Company Telephone Number:	
Contact Email Address:	
Date Work Undertaken:	From: To:
Nature of Services:	

Reference Number 3:

Company Name:	
Contact Name:	
Company Address:	
Company Telephone Number:	
Contact Email Address:	
Date Work Undertaken:	From: To:
Nature of Services:	