



REQUEST FOR PROPOSAL
STRATEGIC PLANNING CONSULTANT

#195

Issue Date: May 20, 2011
Issued by: The Thames Valley District School Board
#195
Cheryl MacKenzie, Buyer
RETURN DATE: Wednesday, June 15, 2011

THAMES VALLEY DISTRICT SCHOOL BOARD
REQUEST FOR PROPOSAL - STRATEGIC PLANNING CONSULTANT - WORKSHEET A - TERMS AND CONDITIONS

<i>ITEM NO.</i>	<i>TERMS AND CONDITIONS</i>	<i>WILL COMPLY/WILL NOT COMPLY</i>	<i>COMMENT</i>
1.0	INTRODUCTION		
1.0	The Thames Valley District School Board (hereafter referred to as the TVDSB) invites interested parties to quotation in response to this bid document. The TVDSB is one of the largest public school boards in the Province of Ontario and is comprised of all public schools within the counties of Elgin, Middlesex, and Oxford. The TVDSB is the employer of approximately 8,000 staff and operates 178 schools with an estimated enrolment of 71,000 students. In total, the TVDSB has over 200 educational and administrative sites spread out over 7,000 square kilometres.		
1.1	PURPOSE		
1.1.1	The purpose of this bid document is to provide interested parties with sufficient information to enable them to prepare and submit bids for consideration by the TVDSB.		
1.1.2	The TVDSB is seeking professional consulting services to facilitate in the development of a new comprehensive five (5) year corporate Strategic Plan.		
2.0	BID DEFINITIONS AND INFORMATION		
2.1	DEFINITIONS		
2.1.1	The following words are used throughout this bid document and bidders should note these conditions when completing their bid submission.		
2.1.1.1	The word "MUST" shall mean bidders "must" include the required information in bid submission. Failure to include the required information will deem submission noncompliant.		
2.1.1.2	The word "SHOULD" shall mean bidders "should" include the required information in bid submission.		
2.1.1.3	The word "NONCOMPLIANT" shall mean bid submissions will be eliminated from further evaluation if the submission does not include the required information.		
2.1.1.4	The word "SUBCONTRACTOR" shall mean a person, firm or company hired by the bidder(s) or the successful bidder(s) to perform any portion or all of this bid.		
2.1.1.5	The word "QUALIFIED" shall mean a bidder who is compliant and has included the required information in their bid submission.		
2.1.1.6	BID IRREGULARITY: A deviation between the requirements (terms, conditions, specifications, special instructions) of a bid response for the purposes of this bid; bid irregularities are further classified as major irregularities or minor irregularities. The classification of what is a major irregularity or a minor irregularity shall be the sole discretion of the TVDSB.		

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2.1.1.6.1	Major Irregularity: A deviation from the bid request which affects the price, quality, quantity or delivery, and is material to the award. If the deviation is permitted, the bidder could gain an unfair advantage over competitors. The TVDSB will reject any bid submission which contains a major irregularity.		
2.1.1.6.2	Minor Irregularity: A deviation from the bid request which affects form, rather than substance. The effect on the price, quality, quantity or delivery is not material to the award. If the deviation is permitted or corrected the bidder would not gain an unfair advantage over competitors. The TVDSB may permit the bidder to correct a minor irregularity.		
2.2	STRUCTURE OF THIS BID		
2.2.1	Bidders must use the electronic bidding file (setup.exe) which is available on the internet at:		
2.2.1.1	www.tvdsb.ca		
2.2.1.2	"Board"		
2.2.1.3	"Purchasing"		
2.2.1.4	"Bids"		
2.2.1.5	Scroll to the end of the document, click		
2.2.1.6	"Proceed to inquiry/download page".		
2.2.1.7	Proceed to the bid, click		
2.2.1.8	"New" Icon		
2.2.1.9	The setup.exe file contains a file named "Appendices195.xls" with the following worksheets:		
2.2.1.10	Worksheet A: Terms and Conditions in Excel format		
2.2.1.11	Worksheet B: Requirements in Excel format		
2.2.1.12	Worksheet C: Qualifications in Excel format		
2.2.1.13	Worksheet D: Pricing in Excel format		
2.2.1.14	Worksheet E: Criteria & Weighting in Excel format		
2.2.1.16	Worksheet F: Non-Disclosure Agreement in Excel format		
2.3	RETURN LOCATION		
2.3.1	Sealed bid submissions must be returned to:		
2.3.2	"Tenders Clerk"		
2.3.3	Tenders Clerk's box, Basement, Education Centre		
2.3.4	Thames Valley District School Board		
2.3.5	1250 Dundas Street		
2.3.6	London, Ontario		
2.3.7	N5W 5P2		

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2.3.8	The bid submission envelope should show the bid document name, number, return date and time (as set out in Section 9.6 - Labelling of Envelope and diskette, memory stick or CD).		
2.3.9	The bid submission must be returned to the "Tenders Clerk" for your bid submission to be accepted.		
2.3.10	Delivery to the "Tenders Clerk" is the responsibility of the bidder.		
2.3.11	Submissions received by electronic transmission (i.e. fax or email) will not be accepted.		
2.3.12	Late bids will be returned to the bidder, unopened, if a return address is included on the submission envelope.		
2.4	IMPORTANT DATES		
2.4.1	ISSUE DATE: Friday, May ,20 2011		
2.4.2	QUESTIONS: Monday, May 30, 2011		
2.4.3	ANSWERS TO QUESTIONS: Wednesday, June 01, 2011		
2.4.4	RETURN DATE and TIME: prior to 12:00:00 noon local time, Wednesday, June 15, 2011		
2.4.5	PRESENTATION/INTERVIEW IF REQUIRED: Tentative Date: Tuesday, June 28, 2011 at approximately 5:00 p.m.		
2.5	QUESTIONS		
2.5.1	All questions pertaining to this bid document are to be addressed to: Cheryl MacKenzie, by Fax (519) 452-2399 or email, c.mackenzie@tvdsb.on.ca no later than Monday, May 30. After this date no further inquiries, concerns or questions may be submitted. The TVDSB reserves the right to distribute a notice of content of any inquiry and the TVDSB's response to all other registered bidders. All questions pertaining to this bid document must be submitted in writing.		
2.5.2	Questions concerning the terms and conditions of the bid document, whether made orally or in writing, to any individual other than indicated above may, at the sole discretion of the TVDSB, render your submission noncompliant. Direct questions in written form only to: Cheryl MacKenzie. The TVDSB will only be bound by written answers to questions .		
2.5.3	Answers to all questions will be posted to the TVDSB web site at www.tvdsb.ca		
2.5.3.1	"Board"		
2.5.3.2	"Purchasing"		
2.5.3.3	"Bids"		
2.5.3.4	Scroll to the end of the document, click		
2.5.3.5	"Proceed to inquiry/download page"		

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2.5.3.6	Proceed to the Bid, click		
2.5.3.7	"Answers to Questions"		
2.5.3.8	View documents in PDF format.		
2.5.3.9	All bid files are available for downloading at no charge from the TVDSB web site.		
2.5.4	Should any questions raised by a bidder necessitate an addendum to this bid document, the addendum will be posted to the TVDSB Web Site. See Section 2.5.3		
2.5.5	All Addenda will be issued at least seven days prior to the closing date. If an addendum is issued within seven days of the closing date, the date will be extended accordingly.		
3.0	CONTRACT TERM / PRICING / TAXES / DELIVERY / PAYMENT		
3.1	CONTRACT TERM		
3.1.1	The term of this agreement shall be for approximately one year terminating on completion of the report by June 2012.		
3.1.2	The TVDSB may, at the end of this contract term, extend the contract for a period of up to three (3) years in one (1) year increments and will advise the bidder in writing of their intentions.		
3.1.3	Bidders must state if your company would agree to extending this contract with the same terms and conditions for a second year ending August 31, 2013.		
3.1.4	Bidders must state if your company would agree to extending this contract with the same terms and conditions for a third year ending August 31, 2014.		
3.1.5	Bidders should state if your company would agree to extending this contract with the same terms and conditions.		
3.2	PRICING		
3.2.1	Bidders must complete the pricing section shown in Worksheet D - Pricing for both Scenarios shown in Worksheet B - Item B2.2		
3.2.2	Bidders must print and sign all Worksheets.		
3.2.3	All charges must be included in the cost of the item. Prices quoted must be for goods and services exactly as specified and in Canadian funds, unless otherwise indicated.		
3.2.4	Prices should remain in effect for the initial term of the contract.		
3.2.5	The TVDSB will not expect any price increases for the exact configuration quoted during the roll out.		

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3.2.6	The TVDSB would like to take advantage of any promotions, price decreases, rebates or new technologies available during the term of the contract. Detail your company's strategy related to future pricing.		
3.3	TAXES		
3.3.1	HST: Where applicable, must be shown separately as extra on all invoices in accordance with Canadian and Provincial Government regulations.		
3.4	INVOICING/PAYMENT TERMS		
3.4.1	All invoices must be sent to the Thames Valley District School Board, 1250 Dundas Street, London, Ontario N5W 5P2. Attention: Accounts Payable.		
3.4.2	Applicable taxes must be shown as separate line items on all invoices.		
3.4.3	Bidders should indicate any specific payment terms. It is generally expected that payment will be 45 days from receipt of invoice.		
3.4.4	Bidders should state percentage discount for early payment and net payment terms.		
4.0	SPECIFICATIONS/REQUIREMENTS		
4.1	REQUIREMENTS		
4.1.1	The requirements are detailed in Worksheet B - Requirements.		
4.1.2	Any material, equipment, service or work ordered which, in the opinion of the TVDSB, does not completely fulfill the specifications must immediately be removed and/or completed to the specifications or sample quality at the expense of the successful bidder.		
4.1.3	The successful bidder(s) must carry out all work to the satisfaction of the TVDSB. All work is to be performed by appropriately certified staff.		
4.1.4	For each requirement as described in Worksheet B, bidders must place a response in the appropriate column.		
4.2	PRESENTATION/INTERVIEW		
4.2.1	Qualified bidders may be required to make a presentation/attend an interview at the bidders' own expense to the evaluation committee. No bid alterations will be allowed. Notification will be given to qualified bidders as to time and place. The presentations are scheduled for Tuesday, June 28, 2011 at approximately 5:00 p.m.		
5.0	TERMS AND CONDITIONS		
5.1	GENERAL TERMS AND CONDITIONS		
5.1.1	Any response submitted to the bid is IRREVOCABLE for 180 days.		

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5.1.2	A bidder who has already submitted a bid may submit an addendum in writing and signed by the bidder at any time up to the official closing time. No facsimiles shall be accepted. The last submission shall supersede and invalidate all previous submissions by that bidder as it applies to this bid. Addenda must be submitted to the "Tenders Clerk" in the same manner and within the same time constraints as the bid submission.		
5.1.3	A bidder may withdraw the bid at any time up to the official closing time by letter bearing his/her signature as it is in the submission. Withdrawal requests received after the closing date shall not be permitted. Submission withdrawals must be submitted to the "Tenders Clerk" in the same manner and within the same constraints as a bid submission.		
5.1.4	The issuance of this call for bids shall not constitute any obligation on the part of the TVDSB to any firm or individual who submits a bid.		
5.1.5	The bidder should have satisfactorily fulfilled all relevant obligations as required under the terms and conditions of any previous award in order to be considered as an acceptable bidder.		
5.1.6	The laws of the Province of Ontario shall govern in any dispute occasioned as a result of the performance or non-performance and/or workmanship of a contract issued pursuant to the bid and any dispute arising out of the issuance of and response to this bid.		
5.1.7	The TVDSB reserves the right to withdraw the award of the contract to a successful bidder(s) within 30 days of the award if in the opinion of the TVDSB the successful bidder(s) is unable or unwilling to enter into a form of contract satisfactory to the TVDSB. The TVDSB shall be entitled to do so without any liability being incurred by the TVDSB to the bidder		
5.1.8	The lowest or any bid submission may not necessarily be accepted. The TVDSB reserves the right to decline any or all bid submissions, or to cancel the bid call in whole or in part at any time prior to making an award, for any reason, or no reason, without liability being incurred by the TVDSB to any bidder for any expense, cost, loss or damage incurred or suffered by the bidder as a result of such withdrawal.		
5.1.9	All costs associated with the preparation of the bid submission will be solely the responsibility of the bidder.		
5.1.10	The TVDSB reserves the right to decline or purchase one or all items in this bid from one supplier or from multiple suppliers.		

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5.1.11	All of the terms and conditions of this bid are deemed to be accepted by the bidder and incorporated into the bidder's proposal submission. It is the TVDSB's intention that the Terms and Conditions stated in this bid and the successful bidder's response to this bid will form the contract between TVDSB and the successful bidder(s). Any conflict in the wording of the bidder's invoice and/or sales agreement and the wording of the terms and conditions of this proposal, shall be resolved in favour of the TVDSB and shall be deemed to be incorporated into the bidder's invoice and/or sales agreement.		
5.1.12	The successful bidder(s) must not at any time subcontract any portion of its contract with the TVDSB nor shall it assign the contract without the written permission of the TVDSB. The successful bidder(s) must not, at any time, change subcontractors approved by the TVDSB without written permission of the TVDSB.		
5.1.13	While the TVDSB has used considerable efforts to ensure an accurate representation of information in this bid document, the information contained herein is contained solely as a guideline for bidders. The information is not guaranteed or warranted to be accurate by the TVDSB, nor is it necessarily comprehensive or exhaustive. Nothing in this bid document is intended to relieve bidders from forming their own opinions and conclusions in respect to the matters addressed in this bid document.		
5.1.14	The TVDSB may accept or waive a minor irregularity, or where practical to do so the TVDSB may as a condition of bid acceptance request a bidder to correct a minor irregularity with no change in bid price. Items of non compliancy on any bid submissions which do not strictly comply with the provisions, procedures and requirements of this bid, or are incomplete, ambiguous, or which contain errors, alterations, misleading information, omissions, or irregularities of any kind, may be rejected and disqualified at the discretion of the TVDSB. All bidders agree to provide all such additional information as, and when requested, at their own expense, provided no bidder in supplying any such information shall be allowed, in any way to change the pricing or other cost quotations originally given in its bid submission or in any way materially alter or add to the solution originally proposed.		
5.1.15	All TVDSB policies, procedures and regulations must be adhered to by the successful bidder(s).		
5.1.15.1	Smoking is prohibited in all TVDSB buildings and on all TVDSB property.		
5.1.15.2	Some TVDSB sites are equipped with video surveillance cameras.		

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5.1.15.3	The successful bidder(s) is obliged to cooperate with all recycling and environmental procedures and initiatives established by government, the TVDSB and each school.		
5.1.16	The successful bidder(s) will reimburse the TVDSB for any damages through negligence or wilful acts of any of the successful bidder(s)' employees or contracted staff.		
5.1.17	The successful bidder(s)' employees and contracted staff shall not be considered TVDSB employees and shall not represent themselves as an agent of the TVDSB nor be eligible for any of the benefits provided to TVDSB employees.		
5.1.18	The TVDSB reserves the right to demand the removal of any successful bidder's employees or contracted staff engaged in this contract if, in the TVDSB's opinion, their conduct has been of an unacceptable nature.		
5.1.19	The successful bidder(s) will be responsible for seeing that regular supervision is maintained over all working personnel. It is the bidder's responsibility to see that all their activities are properly coordinated with the TVDSB's operations and modify assignments as required.		
5.1.20	This bid document is being issued pursuant to the TVDSB's Purchasing Policies and Procedures.		
5.1.21	The acceptance of the bid by the successful bidder and the award of the contract contemplated by this bid document is subject to approval of the Board of Trustees.		
5.2	CANCELLATION OF CONTRACT / LOSS OF SERVICE		
5.2.1	The TVDSB reserves the right to terminate this contract within 30 days written notice if, in its opinion, the successful bidder(s) fails to meet the terms and conditions of the contract. Notwithstanding the termination of the contract, the successful bidder(s) shall remain responsible for its obligations under this contract up to the date of termination. The TVDSB reserves the right to commence an action in a court of competent jurisdiction against the successful bidder(s) for damages that result from the breach of the terms and conditions of the contract, by the successful bidder(s).		
5.2.2	The TVDSB shall have the right to retain and set off from any monies payable to the successful bidder(s) under the contract the total outstanding amount from time to time and for all damage claims by the TVDSB or any third parties arising out of this contract which have not been resolved by the successful bidder(s) or its insurer.		
5.2.3	The TVDSB reserves the right to withhold monies owing under a contract to the value of the obligation to a maximum of the monies owing to the successful bidder(s) for any indebtedness of the supplier that may impact on the TVDSB.		

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5.2.4	The successful bidder(s) shall be responsible for ensuring continuous delivery of the goods and services in the event of a labour disruption by either, the successful bidder(s), the TVDSB's staff or third party interruptions.		
5.2.5	In the event that the successful bidder(s) becomes insolvent, and/or the successful bidder(s) is unable or unwilling to provide the contracted service for a period of more than 30 consecutive days during the period of the contract, the TVDSB shall have the right to replace the successful bidder(s) with another service provider suitable to the TVDSB in addition to all of its other rights pursuant to the term of this bid.		
5.3	FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT		
5.3.1	Bidders agree that all documentation and information contained in any bid submissions and any addendum that becomes the property of the TVDSB shall be subject to disclosure pursuant to an application pursuant to a Municipal Freedom of Information and Protection of Privacy Act request for disclosure. Notwithstanding that a bid submission or an addendum may contain a trade secret of the bidder, intellectual property right of the bidder, or scientific, technical, commercial, pricing or other financial or labour relations information or any other similar secret.		
5.3.2	A bidder specifically consents to the disclosure of any and all information contained in their bid submission or any addendum pursuant to a request for disclosure pursuant to a Municipal Freedom of Information and Protection of Privacy Act and such consent shall be considered a consent given pursuant to Subsection 10(2) of the said Act. Notwithstanding the aforesaid, the bidder assigns all right, title and interest that they have in the bid submission, and any addendum to the TVDSB, including the right to copy and/or publish the same as the TVDSB sees fit, notwithstanding that no request for disclosure is made pursuant to the Municipal Freedom of Information and Protection of Privacy Act.		
5.3.3	All bidders agree not to disclose any information provided by the TVDSB in this bid document to any third party without the written consent of the TVDSB.		
5.4	PERSONAL INFORMATION PROTECTION AND ELECTRONIC DOCUMENTS ACT		

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5.4.1	The Bidder represents and warrants that if the bidder is or becomes subject to any private sector privacy legislation in responding hereto, or in carrying out its obligations under any subsequent agreement, the Bidder will be solely responsible for compliance with such legislation. Without limitation, the Bidders represents and warrants that if the Bidder is subject to the Personal Information protection and Electronics Act, S.C. 2000, c.5, including any amendments thereto ("PIPEDA"), the Bidders shall ensure PIPEDA compliance of:		
5.4.2	All PIPEDA Protected Information the Bidders collects directly from the individual or indirectly from the Board or others.		
5.4.3	All PIPEDA Protected Information the Bidders uses or discloses in the course of responding hereto or in performing its obligation under any subsequent agreement and,		
5.4.4	All PIPEDA Protected Information the Bidder transfers or discloses to the Board		
5.4.5	For the purposes hereof, "PIPEDA Protected Information" means any "Personal Information" or "Personal Health Information" as such terms are defined in PIPEDA.		
5.4.6	The successful bidder(s) will be required to sign a confidentiality agreements shown in Worksheet F.		
5.5	HUMAN RIGHTS AND CHILD LABOUR LAWS		
5.5.1	Any infringement on human rights, but namely those of children, is of considerable concern to the TVDSB. Bidders wishing to do business with the TVDSB are asked to promote the purchase of goods from companies that operate in full compliance with the laws of their respective countries and with all applicable child labour laws, rules and regulations related to hiring, wages, hours worked, overtime and working conditions.		
5.5.2	Bidders should indicate your firm's policy and present practices and procedures in place to encourage promotion of this objective.		
5.5.3	For bidders information the web site address of the International Labour Organization and its objectives toward the abolition of child labour is:		
5.5.3.1	http://www.ilo.org		
5.5.3.2	http://www.ilo.org/public/english/comp/child/policy/towards.htm		
5.6	HEALTH, SAFETY REGULATIONS		

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5.6.1	All equipment requiring approval (Hydro One, C.S.A., ULC., etc.) must be completely assembled and must bear label showing approval of assembly prior to delivery. The TVDSB shall not accept any equipment that has not been inspected and approved. If not so approved, the TVDSB reserves the right to invoice the successful bidder(s) for the cost of certification/replacement.		
5.6.2	Every person who supplies any machine, device, tool, equipment or service to the TVDSB must ensure that the machine, device, tool, equipment or service complies with the Occupational Health and Safety Act and Regulations of Industrial Establishments. The burden of proof rests with the supplier.		
5.6.3	The Ministry of Education and Training and the Ministry of Health provides regulations specifying which substances/ products are not acceptable. If applicable, the successful bidder(s) must supply MATERIAL SAFETY DATA SHEETS providing us with the breakdown of components for any products used in our facilities with every shipment.		
5.6.4	The Occupational Health and Safety Act describes the responsibilities of an employer. The TVDSB requires contractors maintain procedures, training and enforcement so that the responsibilities are carried out at our workplace. The contract shall abide by and strictly adhere to the regulations and conditions set out and laid down by the most current versions of the Occupational Health and Safety Act, 1990, Chapter 0-1. Their workers must be trained in WHIMS in accordance with Occupational Health and Safety Act Regulations. They must adhere to all of the TVDSB's Health and Safety Policy, Procedures and Guidelines and Municipal Bylaws.		
5.6.5	The TVDSB reserves the right to request to request a copy of a bidder's Health & Safety Policy, Procedures and Guidelines.		
5.7	WORKPLACE SAFETY AND INSURANCE BOARD		
5.7.1	The successful bidder(s) must ensure that all workers are covered by the Workplace Safety & Insurance Board for the duration of this contract.		
5.7.2	The successful bidder(s) must furnish a Certificate of Clearance from the Workplace Safety and Insurance Board as evidence that all returns have been made and all necessary assessments have been paid as required, or levied, by the Workplace Safety and Insurance Board. This certification is to be furnished prior to the commencement of this contract. The good standing must be maintained throughout the contract. It is the responsibility of the Contractor to ensure that the Workplace Safety & Insurance Board Certificate is updated every sixty (60) days. The TVDSB reserves the right to request proof of coverage any time throughout the duration of the contract.		

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5.7.3	All workplace injuries or accidents on TVDSB property must be reported by the successful bidder(s) to the TVDSB's representative within 24 hours.		
5.8	COMMERCIAL LIABILITY INSURANCE		
5.8.1	The successful bidder(s) must be covered by Commercial General Liability Insurance throughout the term of the contract. Each bidder must state if it has Commercial General Liability Insurance Coverage.		
5.8.2	Each bidder should show proof with the submission of this bid that upon the award of this contract that it will be covered by Commercial Liability Insurance coverage with limits of \$2 million per occurrence for liability (by way of primary coverage and/or Umbrella Coverage and/or otherwise), arising at law for damages caused by reason of bodily injury (including death) or damage to property by its employees or subcontractors. If the bidder does not presently have \$2 million per occurrence of Commercial Liability Insurance coverage, the bidder shall provide a written assurance from his insurer or agent on the insurer's or agent's letterhead that liability insurance limits will be increased to \$2 million per occurrence from the commencement of the contract should the contract be awarded to the bidder. The successful bidder(s) further agrees to maintain good standing throughout the term of the contract. The TVDSB reserves the right to request proof of coverage any time throughout the duration of the contract.		
5.8.2.1	This liability policy shall contain the following coverage:		
5.8.2.2	Personal Injury & Property Damage		
5.8.2.3	Non-Owned Automobile Liability		
5.8.2.4	Owners and Contractors Protective Coverage		
5.8.2.5	Contractual Liability		
5.8.2.6	Broad Form Property Damage		
5.8.2.7	Products & Completed Operation Insurance		
5.8.2.8	Contingent Employees Liability		
5.8.2.9	Cross Liability Clause and Severability of Interest Clause		
5.8.3	Upon an award to the successful bidder(s) by the TVDSB, the successful bidder(s) shall be required to submit certification in a form satisfactory to the TVDSB of the above-mentioned coverage to protect the TVDSB against claims for property damages and personal injuries, including accidental death, caused by the successful bidder(s) or its employees or subcontractors during the performance of its obligations under the contract.		

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5.8.4	The successful bidder(s) agrees to indemnify, hold harmless and defend the TVDSB from and against any and all liability for loss, damage and expense, which the TVDSB may suffer or for which the TVDSB may be held liable by reason or injury (including death) or damage to any property arising out of negligent or wilful acts on the part of the successful bidder(s) or any of its representatives or employees or subcontractors in the execution of the work performed or from defects in the equipment supplied.		
5.9	MOTOR VEHICLE LIABILITY INSURANCE		
5.9.1	Bidders must state if its own vehicles and/or those vehicles owned by its employees or subcontractors shall operate on the property of the TVDSB.		
5.9.2	In the event of an affirmative answer to 5.9.1, the successful bidders must be covered by Automobile Liability Insurance through the term of the Contract. If the bidder's employees or subcontractors will operate their own vehicles during the contract then they must maintain the same Automobile Liability Coverage as the bidder. Each bidder must state if it or its employees or subcontractors have Automobile Liability Insurance Coverage. Sub clauses also subsection 5.9.3 to subsection 5.9.4 applies to those employees or subcontractors who operate their own automobiles on the property of the TVDSB.		
5.9.3	Bidders should show proof with the submission of this bid, that upon the award of this contract that it will be covered by Automobile Liability Insurance with coverage limits of \$2 million (Commercial and \$1million on all personally owned vehicles) per occurrence for liability arising at law for damages caused by reason or bodily injury (including death) or damage to property by its employees or subcontractors. If the bidder does not presently have \$2 million per occurrence of Automobile Liability Insurance Coverage, the bidder shall provide a written assurance from his insurer or agent on the insurer's or the agent's letterhead that liability insurance limits will be increased to \$2 million for Commercial Vehicles and \$1 million personally owned vehicles per occurrence from the commencement of the contract and annually thereafter for the term of the contract, should the contract be awarded to the bidder. The successful bidder(s) further agrees to maintain that good standing throughout the term of the contract.		
5.9.3.1	The TVDSB reserves the right to request proof of coverage anytime throughout the duration of the contract. This liability policy shall contain the following coverage:		
5.9.3.2	Third Party Liability Coverage in the form of OAP-1		

FIRM NAME : _____

SIGNATURE : _____

THAMES VALLEY DISTRICT SCHOOL BOARD
REQUEST FOR PROPOSAL - STRATEGIC PLANNING CONSULTANT - WORKSHEET A - TERMS AND CONDITIONS

ITEM NO.	TERMS AND CONDITIONS	WILL COMPLY/WILL NOT COMPLY	COMMENT
5.9.4	Upon an award to the successful bidder(s) by the TVDSB, the successful bidder(s) shall be required to submit certification in a form satisfactory to the TVDSB of the above-mentioned coverage to protect the TVDSB against claims for property damage and personal injuries, including accidental death, caused by the successful bidder(s) or its employees or subcontractors during the performance of its obligations under the contract by way of the ownership or operation of an automobile.		
5.9.5	The successful bidder(s) agrees to indemnify, hold harmless, and defend, the TVDSB from and against any and all liability for loss, damage and expense, which the TVDSB may suffer or for which the TVDSB may be held liable by reason of injury (including death) or damage to any property arising out of negligence on the party of the successful bidder(s) or any of its representatives or employees by way of the ownership or operation of an automobile.		
6.0	BIDDER PROFILE		
6.1	ADMINISTRATION & ORGANIZATION		
6.1.1	Bidders should include an organizational chart.		
6.1.2	The TVDSB reserves the right at any time after the closing date, to request from any bidder evidence of its financial standing and stability, including that of each of its officers, directors and principals. All bidders agree to provide at their own expense all such above-related information as may be requested by the TVDSB within four (4) days of the date of any such request.		
6.1.3	Bidders are required to list any and all pending or ongoing legal claims or disputes where the bidder could individually or in combination with other claims, suffer a potential economic loss greater than \$100,000.00.		
6.1.4	Bidders should state if their employees carry photo identification.		
6.1.5	Bidders should state if the staff involved in the execution of this contract are employees or sub-contractors.		
7.0	BID SUBMISSION		
7.1	BIDDER'S RESPONSE GUIDE		
7.1.1	Each bid submission should be structured using only the criteria identified in this bid document. When submitting bids, bidders should use the same numbering format, as on this bid document.		
7.1.2	The bid submission must include:		
7.1.2.1	Printed and signed copies of all Worksheets		
7.1.2.2	One Diskette, Memory Stick or CD with file name "Appendices195.xls" which includes completed:		

FIRM NAME : _____

SIGNATURE : _____

THAMES VALLEY DISTRICT SCHOOL BOARD
REQUEST FOR PROPOSAL - STRATEGIC PLANNING CONSULTANT - WORKSHEET A - TERMS AND CONDITIONS

ITEM NO.	TERMS AND CONDITIONS	WILL COMPLY/WILL NOT COMPLY	COMMENT
7.1.2.2.1	Worksheet A: Terms and Conditions Response in Excel format - Electronic response required		
7.1.2.2.2	Worksheet B: Requirements in Excel format - Electronic response required		
7.1.2.2.3	Worksheet C: Staffing in Excel format - Electronic response required		
7.1.2.2.4	Worksheet D: Pricing in Excel format - Electronic response required		
7.1.2.2.5	Two (2) Page Submission		
7.1.3	It is the bidders responsibility to ensure the that the necessary "files" are on the diskette, Memory Stick or CD.		
7.1.4	Failure to respond in electronic format will deem the bid noncompliant.		
7.1.5	All bid documents should be submitted in an envelope marked with the bid name and number (as set out in Section 9.6 - Labelling Instructions).		
7.1.6	Bidders' submissions should include page numbers for ease of reference by committee members.		
7.1.7	The specifications and pricing section of the bid submission should not make reference to supplemental materials.		
7.1.8	Supplemental materials will not qualify as substitutes for direct responses to the bid's requirements unless specifically requested.		
8.0	AWARD		
8.1	EVALUATION PROCESS		
8.1.1	An evaluation committee will be established to evaluate bid submissions.		
8.1.2	All bid submissions will first be evaluated on their compliance with the requirements of this bid document.		
8.1.3	All compliant bid submissions will be evaluated by a TVDSB evaluation committee.		
8.1.4	The Criteria and Weighting is shown in Worksheet E - Criteria and Weighting		
8.1.5	In the event of a tie score the TVDSB will resolve the tie by drawing a name. All parties will have representation at the draw.		
8.1.6	Compliant bidders may be requested to make a presentation of their bid for clarification only. No alteration of your submission will be permitted. Notification will be given to qualified bidders as to the time and place. The presentation shall be at the expense of the bidder. The tentative date is June 28, 2011.		
8.1.7	Delivery, lead times, service, performance record, and the value of the overall award will also be taken into consideration when awarding this contract.		
8.1.8	The determination of equal quality will be based on our internal professional opinions.		
8.2	AWARD AND NOTIFICATION OF CONTRACT		

FIRM NAME : _____

SIGNATURE : _____

THAMES VALLEY DISTRICT SCHOOL BOARD
REQUEST FOR PROPOSAL - STRATEGIC PLANNING CONSULTANT - WORKSHEET A - TERMS AND CONDITIONS

ITEM NO.	TERMS AND CONDITIONS	WILL COMPLY/WILL NOT COMPLY	COMMENT
8.2.1	The results of this bid will be posted to the TVDSB web site as soon as decisions have been made:		
8.2.1.1	www.tvdsb.ca		
8.2.1.2	"Board"		
8.2.1.3	"Purchasing"		
8.2.1.4	"Bids"		
8.2.1.5	Scroll to the end of the document, click		
8.2.1.6	"Proceed to inquiry/download page".		
8.2.1.7	Proceed to the Bid, click		
8.2.1.8	"Results - Check Mark"		
8.2.1.9	View documents in PDF format.		
8.2.2	All bid files are available for downloading at no charge from the TVDSB web site.		
8.3	DEBRIEFING		
8.3.1	Not later than 60 Days following the date of posting of a contract award notification in respect of the RFP, a Bidder may contact the Buyer requesting a debriefing from the TVDSB, and the TVDSB shall conduct such debriefing in accordance with the requirements of the Ontario Supply Chain Guidelines.		
8.3.2	Any request that is not timely received will not be considered and the Bidder will be notified in writing.		
8.3.3	Bidders should note that, regardless of the time of submission of a request by a Bidder, debriefings will not be provided until such time as a contract award notification has been posted.		
8.4	BID PROTEST PROCEDURE		
8.4.1	In the event that a Bidder wishes to review the decision of the TVDSB in respect of any material aspect of the RFP process, and subject to having attended a debriefing, the Bidder shall submit a protest in writing to the TVDSB within 10 days from such a debriefing.		
8.4.2	Any protest in writing that is not timely received will not be considered and the Bidder will be notified in writing.		
8.4.3	A protest in writing shall include the following:		
8.4.4	A specific identification of the provision and/or procurement procedure that is alleged to have been breached;		
8.4.5	A specific description of each act alleged to have breached the procurement process;		
8.4.6	A precise statement of the relevant facts;		
8.4.7	An identification of the issues to be resolved;		
8.4.8	The Bidder's arguments and supporting documentation; and		

FIRM NAME : _____

SIGNATURE : _____

THAMES VALLEY DISTRICT SCHOOL BOARD
REQUEST FOR PROPOSAL - STRATEGIC PLANNING CONSULTANT - WORKSHEET A - TERMS AND CONDITIONS

ITEM NO.	TERMS AND CONDITIONS	WILL COMPLY/WILL NOT COMPLY	COMMENT
8.4.9	The Bidder's requested remedy.		
	Cheryl MacKenzie Purchasing Department	Tracy Grant Chairperson	
9.0	ELECTRONIC BIDDING INSTRUCTIONS		
9.1	DOWNLOADING BID DOCUMENTS		
9.1.1	All documents are available from the TVDSB Web Site at www.tvdsb.ca		
9.1.2	Click "Board"		
9.1.3	Click "Purchasing"		
9.1.4	Click "Bids"		
9.1.5	Read instructions		
9.1.6	Click "Proceed to Inquiry/Download page"		
9.1.7	Click on the "Name of the Bid" to view documents in PDF format.		
9.1.8	Click on the "NEW" logo to download the executable files for preparing and submitting your bid.		
9.1.9	All bid files are available for downloading at no charge from the TVDSB web site.		
9.2	PRINTING COPIES OF BID DOCUMENTS		
9.2.1	To print a working copy of any bid document - Click on the "name of the Bid" to print documents in PDF format.		
9.3	COMPUTER SYSTEM REQUIREMENTS		
9.3.1	To use the electronic system, bidders must have the following equipment:		
9.3.1.1	Microsoft Windows, version 9.5 or greater		
9.3.1.2	2.5 MB available hard drive space		
9.3.1.3	3 ½ 1.44 MB diskette drive, CD Burner or USB port.		
9.4	INSTALLATION OF BID PROGRAM ONTO YOUR COMPUTER:		
9.4.1	The TVDSB has made every effort to ensure the files are free of any virus and are functional. However, in safe computing practice, you are responsible for checking the files on your own virus checker to ensure it is free of any virus.		
9.4.2	Download the executables from our Web Site as shown above. Double click on the "NEW" logo for the executable file. Follow the instructions.		
9.4.3	The bid files are installed into a default directory called C:\LBTENDER. When the installation process is complete, a box will appear with a "Remove Thames Valley District School Board Tender icon"; please close this box. When the setup is complete, click close.		
9.4.4	To begin the Bid Program:		
9.4.4.1	Go to Windows Explorer		

FIRM NAME : _____

SIGNATURE : _____

THAMES VALLEY DISTRICT SCHOOL BOARD
REQUEST FOR PROPOSAL - STRATEGIC PLANNING CONSULTANT - WORKSHEET A - TERMS AND CONDITIONS

ITEM NO.	TERMS AND CONDITIONS	WILL COMPLY/WILL NOT COMPLY	COMMENT
9.4.4.2	Click on C:\ drive		
9.4.4.3	Open the folder "lbtender"		
9.4.4.5	The following files will be installed in the C:\lbtender directory:		
9.4.4.6	Appendices195.xls		
9.4.5	To start the process open the Excel files and complete the Worksheets, A, B, C & D as instructed.		
9.5	DISKETTE, MEMORY STICK OR CD CREATION:		
9.5.1	After all bids have been entered:		
9.5.1.1	Copy the "Appendices195.xls" file to either a 3.5" diskette, memory stick or CD using your company's standard CD Writing program.		
9.5.1.2	Check to ensure that the "files" are on the diskette, memory stick or CD. Without these files we will not be able to download your bid.		
9.5.1.3	Be sure to label your diskette, memory stick or CD with company name and signature.		
9.6	LABELLING OF ENVELOPE AND DISK		
9.6.1	ADDRESS BID ENVELOPE AS SHOWN BELOW:		
9.6.1.1	From - Company Name & Address		
9.6.1.2	To: OFFICE OF THE TENDERS CLERK		
9.6.1.3	Thames Valley District School Board		
9.6.1.4	EDUCATION CENTRE,		
9.6.1.5	1250 Dundas Street,		
9.6.1.6	LONDON, Ontario		
9.6.1.7	N5W 5P2		
9.6.1.8	Strategic Planning Consultant		
9.6.1.9	Bid #195		
9.6.1.10	Return Date: 12:00:00 noon local time - Wednesday, June 15, 2011		
9.7	PLEASE AFFIX LABEL ON DISK OR MEMORY STICK AS SHOWN BELOW:		
9.7.1	THAMES VALLEY DISTRICT SCHOOL BOARD		
9.7.2	Strategic Planning Consultant		
9.7.3	Bid #195		
9.7.4	Return Date: 12:00:00 noon local time - Wednesday, June 15, 2011		
9.7.5	Signature:		
9.7.6	Firm Name:		
10.0	SIGNATURE PAGE		
10.1	This section must be completed, signed, and included with your submission for your bid to be accepted.		

FIRM NAME : _____

SIGNATURE : _____

THAMES VALLEY DISTRICT SCHOOL BOARD
REQUEST FOR PROPOSAL - STRATEGIC PLANNING CONSULTANT - WORKSHEET A - TERMS AND CONDITIONS

ITEM NO.	TERMS AND CONDITIONS	WILL COMPLY/WILL NOT COMPLY	COMMENT
10.2	I hereby acknowledge and agree that I have read and completed all of the preceding Contract Terms and Conditions and all Appendices. All required Appendices are included in our bid submission.		
10.3	I/We the undersigned are duly authorized to execute this Bid Submission on behalf of:		
10.4	NAME (Please print):		
10.5	TITLE:		
10.6	SIGNATURE:		
10.7	FIRM NAME:		
10.8	State the legal entity that your organization operates under:		
10.8.1	Proprietorship		
10.8.2	Partnership		
10.8.3	Corporation		
10.9	If your organization is incorporated, bidders must state the jurisdiction in which the corporation was originally incorporated in:		
10.9.1	Name of each individual Partner or Correct Legal Name of Corporation:		
10.9.2	E-MAIL ADDRESS:		
10.9.3	ADDRESS:		
10.9.4	INTERNET ADDRESS:		
10.9.5	TELEPHONE NO.:		
10.9.6	FAX NO.:		
10.10	If subcontracting, bidders must provide the correct legal name for any sub contractor, their full personal name and address, telephone number, fax number, as well as the name(s) of appropriate contact persons (with whom the TVDSB may consult regarding this bid with whom the bidder enters into a contract(s) with to carry out any portion of this contract:		
10.10.1	Firm Name:		
10.10.2	Firm Address:		
10.10.3	Telephone Number:		
10.10.4	Fax Number:		
10.10.5	E-MAIL ADDRESS:		

FIRM NAME : _____

SIGNATURE : _____

**REQUEST FOR PROPOSAL - STRATEGIC PLANNING CONSULTANT
- WORKSHEET B - REQUIREMENTS**

ITEM NO.	TERMS AND CONDITIONS	BIDDERS RESPONSE	COMMENT
B1.0	WORKSHEET B - REQUIREMENTS		
B1.1	The TVDSB is seeking professional consulting services to facilitate in the development of a new comprehensive five (5) year corporate Strategic Plan.		
B2.0	SCOPE OF WORK		
B2.1	Facilitate a strategic planning process with Trustees and Senior Staff.		
B2.2	Bidders are asked to quote pricing in Worksheet D for two different scenarios:		
B2.2.1	Scenario 1. The successful bidder meets with groups: Trustees, Senior Staff, Federations, Unions, Community Stakeholders and Community Organizations to seek their input.		
B2.2.2	Scenario 2. "Train the Trainer" - the successful bidder will train TVDSB employee(s) to meet with Trustees, Senior Staff, Federations, Unions Community Stakeholders and Community Organizations to seek their input. The input would then be analyzed by the successful bidder.		
B2.3	The successful bidder will be responsible for identifying the methodology to be used for gathering information from all stakeholders.		
B2.4	The successful bidder(s) will facilitate strategic planning sessions with the Trustees and Senior staff on Friday, August 26, 2011 from 1:00 p.m. until 4:00 p.m. and all day on Saturday, August 27, 2011.		
B2.5	The successful bidder(s) will:		
B2.5.1	<ul style="list-style-type: none"> • Design and develop the most appropriate Strategic Planning process. 		
B2.5.2	<ul style="list-style-type: none"> • Participate in meetings with TVDSB staff regarding the strategic planning process. 		
B2.5.3	<ul style="list-style-type: none"> • When quoting on the two scenarios bidders should take into consideration they may or will be required to travel to meet with all stakeholders. (Mileage will be paid at the TVDSB rate of \$.41 per km. Any reasonable charges for accommodation or meals will be covered by the TVDSB and will be based on a per diem of \$46.40 per day.) 		
B2.5.4	<ul style="list-style-type: none"> • Have access to a computer with e-mail and internet. 		
B2.5.5	<ul style="list-style-type: none"> • The successful bidder should provide their own clerical support 		
B2.5.6	<ul style="list-style-type: none"> • Advise of any problem areas in developing the strategic plan. 		
B3.0	DELIVERABLES		
B3.1	Reviewing the strategic plan and planning policies for the TVDSB.		
B3.2	A written report outlining strategic goals, activities to achieve goals, and timelines or milestones for implementing strategic plan.		

FIRM NAME: _____

SIGNATURE: _____

**REQUEST FOR PROPOSAL - STRATEGIC PLANNING CONSULTANT
- WORKSHEET B - REQUIREMENTS**

ITEM NO.	TERMS AND CONDITIONS	BIDDERS RESPONSE	COMMENT
B4.0	TIMEFRAME		
B4.1	The process will take approximately one (1) year.		
B4.2	A final report must be approved by the Board of Trustees by June 2012.		
B4.3	Bidders must provide a schedule detailing the process for the completion date stated above in B4.2.		
B4.4	Bidders should state any special requirements.		
B5.0	QUALIFICATIONS		
B5.1	Bidders should state their qualifications and experience in Worksheet C - Qualifications.		
B5.2	Bidders must describe their knowledge, understanding and or experience with the following:		
B5.2.1	• Publicly funded education system		
B5.2.2	• Education Act of Ontario		
B5.2.3	• Ontario Bill 177		
B5.2.4	• Ontario Ministry of Education requirements for funding		
B5.2.5	• Framework for developing strategic plan		
B5.2.6	• Understanding of Ministry Initiatives		
B5.2.7	• Facilitation skills working with staff and stakeholders		
B5.2.8	• Other relevant legislation		
B5.3	Bidders must prepare submissions not to exceed 2 (two) pages in total (8 1/2" x 11", minimum 10 pt. font) identifying how their experience and qualifications would make them the candidate for the position described in this RFP. Any additional information submitted will not be reviewed.		
B5.4	Describe your experience in dealing with the Ministry of Education initiatives and how you remain current with emerging issues and requirements.		
B6.0	PRESENTATION/INTERVIEW		
B6.1	Qualified bidders may be required to make a presentation/attend an interview at the bidders' own expense to the evaluation committee. No bid alterations will be allowed. Notification will be given to qualified bidders as to time and place. The presentations are scheduled for Tuesday, June 28, 2011 at approximately 5:00 p.m.		
B7.0	TRAINING / SUPPORT		
B7.1	Training and support services are a consideration in awarding this bid. Include any and all support or any other services you will provide, identifying certification relevant to the support role envisioned.		
B7.2	Bidders must include a statement outlining your quality assurance philosophy and program.		

FIRM NAME: _____

SIGNATURE: _____

**REQUEST FOR PROPOSAL - STRATEGIC PLANNING CONSULTANT
- WORKSHEET B - REQUIREMENTS**

ITEM NO.	TERMS AND CONDITIONS	BIDDERS RESPONSE	COMMENT
B8.0	REFERENCES		
B8.1	Bidders must provide a minimum of three references where you have successfully provided goods and or services similar to this bid document. One reference must be from an agency other than the TVDSB. The reference must contain the following information:		
B8.1.1	Reference 1 - Company Name:		
B8.1.2	Reference 1 - Address:		
B8.1.3	Reference 1 - Contact Name:		
B8.1.4	Reference 1 - Phone Number:		
B8.1.5	Reference 1 - Fax Number:		
B8.1.6	Reference 1 - e-mail address:		
B8.2.1	Reference 2 - Company Name:		
B8.2.2	Reference 2 - Address:		
B8.2.3	Reference 2 - Contact Name:		
B8.2.4	Reference 2 - Phone Number:		
B8.2.5	Reference 2 - Fax Number:		
B8.2.6	Reference 2 - e-mail address:		
B8.3.1	Reference 3 - Company Name:		
B8.3.2	Reference 3 - Address:		
B8.3.3	Reference 3 - Contact Name:		
B8.3.4	Reference 3 - Phone Number:		
B8.3.5	Reference 3 - Fax Number:		
B8.3.6	Reference 3 - e-mail address:		

FIRM NAME: _____

SIGNATURE: _____

ITEM NO.	Position/Title	No. of Years Experience	Education	Brief Job Description	Typical Work Assignments	List any Professional Development Courses attended within the last 3 years
	Bidders must provide a brief description of the qualifications and experience					
C1						
C2						
C3						
C4						
C5						

FIRM NAME: _____

SIGNATURE: _____

REQUEST FOR PROPOSAL - STRATEGIC PLANNING CONSULTANT -
WORKSHEET D - PRICING

ITEM NO	DESCRIPTION WORKSHEET D - FEES AND FEE SCHEDULE, INCLUDING DISBURSEMENTS	COST - SCENARIO 1 - ATTENDING ALL PLANNING SESSION	SCENARIO 2 - TRAIN THE TRAINER	COMMENTS
	All proposals must clearly outline the responsibilities both of the TVDSB and the successful vendor. ALL costs payable by the TVDSB for these services must be clearly defined. Bidders must clearly describe your fees and fee schedule .			
D1	An all-inclusive Fee Schedule, including, if any, instalment payments AND schedule separated into the options below:			
D1.1	State Salaries, Fees and fee structure - Hourly rate, set fee etc.			
D1.2	Is total cost based on completion of project or based on number of days stated above?			
D1.3	State total number of hours included in this price.			
D1.4	State hourly rate for any additional hours.			
D1.5	Are charges based on time at our premises?			
D2	Other disbursements, as listed below:			
D2.1	• Administrative Overhead			
D2.2	• Supplies			
D2.3	• Clerical Support			
D2.4	• Long distance telephone charges			
D2.5	• Fax, postage/courier			
D2.6	• Use of electronic databases			
D3	Disengagement fee (should the Board cancel the contract)			
D4	Is there a minimum charge if program cannot run?			
D5	Bidders must state billing period (e.g. monthly) and a description of these expected expenses.			
D6	If your fee states progress billing, please list instalments based on your timetable of service and in conjunction with the progress reports you will provide.			
D7	State the terms of the firm's guarantee, if the TVDSB is not satisfied.			
D8	Bidders must state any other expenses below:			
D8.1				
D8.2				
D8.3				
D8.4				
D8.5				
D8.6				
D8.7				
D8.8				
D8.9				
D8.10				

FIRM NAME: _____

SIGNATURE: _____

**REQUEST FOR PROPOSAL - STRATEGIC PLANNING
CONSULTANT
- WORKSHEET E - CRITERIA WEIGHTING**

ITEM NO.	CRITERIA	POINTS	SUB CATEGORIES	SUB-POINTS
1.0	Fees	30		
1.1			Consulting Fee	30
2.0	Qualifications and Experience	35		
2.1.			Experience in public sector strategic planning– including years of experience and positions held	10
2.2.			Experience with Ministry of Education funding and initiatives	10
2.3			Relevant educational background	5
2.4			Specialized skills, training and background strategic consulting assignments	10
3.0	Value Added Benefits	8	Additional services offered	8
4.0	References	10	5 Points for each reference	10
5.0	Bid Submission	2	Completeness of submission	2
6.0	Interview if required	25		25
Total		110		110

AGREEMENT REGARDING THE SECURITY OF PERSONAL INFORMATION AND CONFIDENTIAL RECORDS, AND NON-DISCLOSURE

This Mutual Agreement regarding the security of Personal Information and Confidential Records, and Non-Disclosure (the "Agreement") is made and entered into between Thames Valley District School Board, with its headquarters' address of 1250 Dundas Street, P.O. Box 5888, London, Ontario N6A 5L1 and with its headquarters with respect to the following.

A. DISCLOSURE

During the discussion of a possible business or contractual relationship between the parties or in the performance of contractual obligations, the parties may disclose information orally, in writing or by other means and media, to each other about their respective operations and business, including without limitation, computer programs, know-how, processes, ideas, inventions and business, financial and product development plans and strategies as well as any other information clearly communicated to the receiving party as confidential or proprietary and all of the afore-described information is essential to the disclosing party's conduct and operation of its business and which information is confidential and proprietary information to the disclosing party ("Personal and Confidential Information").

B. PERSONAL INFORMATION

The parties recognize the application of and responsibilities under the Municipal Freedom of Information and Protection of Privacy Act, R.S.O., 1990, c.M-56 (MFIPPA) and Regulations thereunder, as amended from time to time, and to the collection, use and disclosure of personal information under the control of the Board. Personal information is as defined in Section 2 of the Municipal Freedom of Information and Protection of Privacy Act.

- a. The Receiving Party shall comply with all provisions of MFIPPA and all Board policies and procedures regarding the collection, use and disclosure of personal information under the control of the Board;
- b. Under no circumstances shall the Receiving Party disclose personal information under the control of the Board;
- c. The Receiving Party shall employ appropriate security measures, as determined by the Board in its sole discretion, to protect the confidentiality of the personal information in its possession but under the control of the Board in if in the Receiving Party's possession as a result of the services being provided for the Board;
- d. Only those employees or agents employed by the Receiving Party who require access to personal information under the control of the Board for the purpose of performing their duties with respect to the services being provided to the Board shall be provided with access to such personal information;
- e. The Receiving Party shall either return or destroy, as determined by and in a manner to be determined by the Board in its sole discretion, any and all personal information under the control of the Board if in the Receiving Party's possession as a result of the services provided by the Receiving Party to the Board.

C. COLLECTION BY RECEIVING PARTY

The parties recognize the application of the Personal Information Protection and Electronic Documents Act, S.C. 2000, c.5 (PIPEDA) and Regulations and Schedules thereunder, as amended from time to time, to the collection, use and disclosure of personal information for its own use and/or benefit.

- a. For the purpose of the application of the PIPEDA, the definition of personal information shall be as defined pursuant to PIPEDA.
- b. The Parties agree that at no time will the Receiving Party, for its own use and/or benefit collect, use or disclose personal information about and/or belonging to students of the Board.

D. CONFIDENTIALITY

The Board is willing to provide Personal and/or Confidential Information to the Receiving Party on the condition that the Receiving Party holds the Personal and/or Confidential Information in confidence on the terms and conditions hereinafter set forth.

NOW THEREFORE, in order to induce the Board to provide the Receiving Party with the Personal and/or Confidential Information and for other good and valuable consideration, the Receiving Party hereby warrants, represents and agrees as follows:

- a. Confidentiality - The party receiving Personal and/or Confidential Information ("Receiving Party") hereby agrees to hold in the strictest confidence any and all Personal and/or Confidential Information provided by Thames Valley District School Board (the Board).
- b. Non-Disclosure - The Receiving Party hereby agrees that neither it nor its employees or agents will reveal, duplicate, or otherwise make available the Personal or Confidential Information other than to its own employees or agents' employees who have a business need to know and other than is reasonably necessary for the purposes of this Agreement and the performance of contractual obligations under separate agreements.

c. No License - Nothing contained in this Agreement shall be construed as granting or conferring any rights by license or otherwise in any Personal or Confidential Information disclosed to the Receiving Party.

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d. No Obligation - The furnishing of Personal and/or Confidential Information under this Agreement does not obligate either party to enter into any further agreement or negotiation with the other or to refrain from entering into an agreement or negotiations with any other party. However, no Personal or Confidential information provided to the Receiving Party may be shared with any other party without the expressed permission of the Board.

e. Termination - This Agreement shall continue in effect until terminated by either party in writing. However, the obligations hereunder with respect to any disclosures made while this Agreement is in effect will continue indefinitely thereafter. The Receiving Party shall, upon request of the Board, return or destroy any and all of the Personal and/or Confidential Information provided by the Board that is or has been in its possession and shall retain no copies of the Board's Personal and/or Confidential Information other than one copy for archival purposes only, as required by law.

f. Provisions Inapplicable - Personal and Confidential Information does not include information that:

- i. is now, or in the future becomes, freely available to the public through no fault of or action by the Receiving Party;
- ii. was in possession of the Receiving Party prior to the time of disclosure by the Board or that is independently acquired or developed by the Receiving Party without the aid, application or use of the Personal and/or Confidential Information;
- iii. is obtained by Receiving Party in good faith without knowledge of any breach of a secrecy arrangement from a third party;
- iv. is disclosed with the written approval of the Board; or
- v. is required to be disclosed by law or court order; provided that the Board is notified thereof promptly in writing in order to allow the Board an opportunity to take reasonable steps in response thereto.

E. MISCELLANEOUS

a. Personal and Confidential Information is provided on an "AS IS" basis. The Board makes no warranties, express or implied, with respect to the Personal and Confidential Information. The Board shall not be liable for any damages incurred by the Receiving Party arising out of the misuse, retention and/or disposal of Personal and/or Confidential Information provided to it by the Board. The Receiving Party shall be liable to the Board for any misuse, retention and/or wrongful disposal of Personal and/or Confidential Information loaned to it in the service of this contract.

b. Failure of either party hereto to enforce at any time any provision of this Agreement or to exercise any right provided herein shall not in any way be construed to be a waiver of such provision or right nor in any way affect the validity of this Agreement or limit, prevent or impair the right of either party subsequently to enforce such provision or exercise such right.

c. The Receiving Party agrees further that it will not without the prior written consent of the Board, directly or indirectly, in any manner whatsoever, including, without limitation, either individually or in conjunction with any other Person, as principal agent, shareholder, or in any manner whatsoever use the Personal and/or Confidential Information provided by the Board to carry on or be engaged in or be concerned with or interested in a business which is reasonably similar to the current or planned Business of the Recipient. (a "Competitive Business").

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d. This Agreement shall not be assigned by either party without the prior written consent of the other party.

e. The Receiving Party agrees that improper disclosure by it of Personal and/or Confidential Information provided by the Board shall result in irreparable damages and that, in the event that the Board is required to bring an action to enforce the provisions of this Agreement, it shall be entitled to equitable relief, including a preliminary injunction, in addition to all other relief.

f. In the event that either party hereto deems it necessary to pursue any proceedings to enforce the provision of this Agreement, the party prevailing in such proceedings shall be entitled to recover from the other party reasonable attorneys' fees, court costs and other expenses incurred therein.

g. This Agreement shall be construed and enforced in accordance with the internal, substantive laws of the Province of Ontario, but without regard to conflicts of law principles thereof.

This Agreement is effective on the date that it is signed by

THAMES VALLEY DISTRICT SCHOOL BOARD _____

By: _____ By: _____

Signer's Printed Name: _____ Signer's Printed Name: _____

Title: _____ Title: _____

Effective Date: _____ Effective Date: _____