



Request for Proposals

Respite Services for Children and Youth with Special Needs (CYSN)

- Environmental Scan
- Comprehensive Literature Review
- Knowledge Synthesis and Options Paper

Closing time and date:

- Proposals must be received via email to Judith Hutson, Project Manager, CYSN Initiative cysn@msfhr.org by 4 p.m. PST Friday, September 6, 2019

Issue date: Monday, August 12, 2019

Contents

1. Context.....	1
1.1 About MSFHR.....	1
1.2 Background	1
1.3 Project Overview and Key Insights.....	2
2. Key Deliverables.....	4
2.1 Environmental Scan: Respite Services - Canada	6
2.2 Comprehensive Literature Review: Respite Services and Supports – British Columbia.....	6
2.3 Knowledge Synthesis and Options Paper	7
3. Eligibility Criteria	8
4. Contract Amount and Key RFP Dates.....	8
5. Application Format	8
5.1 Page Format.....	8
5.2 Page Count.....	9
5.3 Appendices.....	9
6. Deliverables.....	9
6.1 Key Deliverables – Timeline	9
6.2 Accountability	9
6.3 Progress Reporting.....	9
7. Application Content	10
7.1 Contact Information.....	10
7.2 Business Information	10
7.3 Proponent Leadership.....	10
7.4 Proponent’s Team Members (if proposed).....	10
7.5 Declaration of Stakeholder Affiliation or Association.....	10
7.6 Background and Objectives	10
7.7 Description	10
7.8 Financial Plan and Proposed Payment Terms.....	10
7.8.1 Ineligible Expenses.....	10
7.9 Work Plan.....	11
7.10 Risks to Successful Completion and Mitigation Strategies	11
8. RFP Process	11
8.1 Accountability	11

8.2 Submissions.....	11
8.3 Enquiries	12
8.4 Selection Process	12
8.5 Selection Criteria.....	12
8.5.1 Merit and Feasibility of Approach.....	12
8.5.2 Risk Mitigation	12
8.5.3 Quality and Qualifications of Personnel	12
8.5.4 Financial Plan and Proposed Payments Terms	12
8.5.5 Work Plan.....	12
Appendix A: Terms and Conditions.....	13
Appendix B: Financial Plan Template.....	15

1. Context

1.1 About MSFHR

The Michael Smith Foundation for Health Research (MSFHR) is BC's health research funding agency. MSFHR helps develop, retain and recruit the talented people whose research improves the health of British Columbians, addresses health system priorities, creates jobs and adds to the knowledge economy. Learn more at www.msfhr.org.

1.2 Background

From time to time, the government of British Columbia seeks the support of MSFHR to facilitate development of evidence-based advice and guidance on key policy and service delivery issues. Building on its strong ties to the health research community provincially, national and internationally, MSFHR convenes or contracts with subject matter experts and methodology resources to identify, contextualize, synthesize and report on current knowledge in areas of interest, to contribute to the relevance and quality of government policy and service delivery decisions.

In 2017, a provincial cross-ministry Children and Youth with Special Needs (CYSN) Framework for Action Working Group engaged with MSFHR to explore how the Foundation might support the Working Group's evidence needs relating to CYSN. Three topic areas were identified as priorities with related research questions that were potentially actionable for further study. MSFHR facilitated a Task Group process to further review potential responses to government evidence needs in these topic areas. In February 2018 three task groups were struck, one to address each of the three topic areas:

- A. Early intervention services for children who have or who are at risk of developmental delay or disability
- B. Respite services and supports for families of CYSN
- C. Employment supports for youth with multiple barriers with a focus on mental health and substance use

Each task group was comprised of government representative(s) and two or more Canadian researchers with expertise in the relevant topic area. The Task Forces' mandate was to advise the Working Group and MSFHR on the scope of and desired approach to addressing their specific research topic and related research questions, including timelines, budgets and descriptions of anticipated deliverables.

Recommendations from all three task groups were submitted in July 2018 to MSFHR and the cross-ministry Working Group. Each group recommended commissioning a suite of research "products" – an integrated set of activities they considered might be of most value to inform policy development and service delivery planning in their respective topic area.

In October 2018, the cross-Ministry Working Group accepted the recommendations and commissioned MSFHR to proceed with implementing them over the next two years – a body of work referred to hereinafter as The CYSN Initiative ("the Initiative").

This Request for Proposals (RFP) aims to address the topic area of respite services and supports for families of children with special needs.

1.3 Project Overview and Key Insights

The purpose of this RFP is to solicit proposals to complete one environmental scan, a comprehensive literature review, and a knowledge synthesis and options paper that focus on respite services and support for families of CYSN (children and youth with special needs) in order to provide evidence-based advice that will support better, less fragmented services to families of CYSN in BC.

This work will inform the ongoing development of the CYSN Service Framework.

CYSN Service Framework

The Ministry of Children and Family Development (MCFD) is currently developing a Child and Youth with Special Needs (CYSN) Service Framework to provide overarching policy and guide investment for the suite of CYSN services, ready for a phased implementation in April 2020. The objective of the CYSN Service Framework is to establish an approach to delivery and access driven by the needs of children and families that is reflective of current research.

The service framework will state guiding principles; clarify pathways for eligibility determination and access to services; explain what services are provided; clarify how services are delivered, evaluated, and interact with other child/family service systems; and explain how MCFD resources are allocated. This includes foundational programs, family support services, specialized provincial services, CYSN social worker services, transitions support, linkages/intersection of related services (i.e. health, education, child and youth mental health, child care), adult services as it relates to youth transitions, and CYSN in care of MCFD. Nursing support services, child and youth mental health services, and public health early speech and language services will not be included in the service framework.

The Ministry contracted two consulting firms to help government understand how CYSN services and supports can be improved to meet the needs of children and youth with special needs and their families:

- KPMG was contracted to research the experience of families and service providers accessing, moving through and transitioning out of MCFD CYSN services, and to analyze the suite of CYSN's services to better understand the opportunities and challenges that users of the current system encounter.
- Reciprocal Consulting, an Indigenous consulting and research firm, led the user experience research with Indigenous families focusing on their experiences and journeys as they seek and move through MCFD's system of supports and services.

This research, along with reports by the Representative of Children and Youth, reports and articles provided by stakeholders and academic research was analyzed revealing six key themes: access, eligibility, equity, cultural responsiveness, inclusion, and family support. Details on these themes will be available for review in the coming weeks.

The next steps of developing the service framework include draft framework consultation (fall 2019), the public release of service framework (spring 2020), and to begin phased implementation (spring 2020).

Key Insights from the Respite Services Task Group Report (July, 2018)

The Respite Services Task Group identified a number of agreements and assumptions that shaped the final recommendations, including the recommendation to proceed with the RFP to complete the referenced deliverables:

- The definition of respite services is changing, reflecting the input of families and providers, and adding a focus on supporting healthy family life and family well-being more broadly. One important piece of the work anticipated by this report should be to ensure exploration of how respite is defined in various contexts and by different stakeholders. This definition is particularly important in relation to future regulations and policies that determine access and funding/supply of services.
- A comprehensive review of respite services for families of children with disabilities conducted in Ontario in 2013¹ found that:
 - Respite services are diverse and vary by purpose, location, duration and provider.
 - Current research on respite services focuses mostly on describing services, but few empirical studies have measured the impact and outcomes of different respite models or services.
 - Within the context of this limited research, the array of respite services including residential, in-home and community respite services are reported to be beneficial for parents and children.
 - Researchers and families agree that a one-size-fits-all approach is not ideal and that a family-centred approach that includes a wide range of services would be most effective for service users.
 - Family-centred respite services should be provided within a continuum of services offered by multiple stakeholders whose overall goal is to support healthy family functioning and family resilience.
 - As the Ontario study was unable to identify any published evaluations of a family-centered model, the report recommended that any implementation of such a model should be evaluated to ensure effectiveness and to add to existing research knowledge.
- The population referred to as “families of CYSN requiring respite services” is not a homogeneous group – it is comprised of multiple unique subgroups, each with unique support needs and unique barriers to meeting those needs. This diversity is made more complex due to other diverse and social determinants such as geography, culture/race, gender, education and socio-economic status.
- What “works” or “fits” in one context and for the families of children with a given type of support needs (e.g. the two-parent, urban family with a non-verbal toddler with complex physical disabilities) will differ significantly from others (e.g. the single parent living in a rural and remote setting with a teenager displaying emotional and behavioural concerns).
- Research and evaluation of respite support policies and services in other jurisdictions outside BC may well suggest options for BC policies, however, any options must be selected in

¹ *Evidence In-Sight: Models of respite service for families of children with disabilities*. Ontario Centre of Excellence for Child and Youth Mental Health, March 2013. Accessed May 17, 2018 from www.excellenceforchildand youth.ca/file/9385/download?token=wscWq2wj

consideration of BC's specific context including social, geographic, policy framework and other realities. This is particularly true for consideration of services modelled on programs from outside Canada. While practice and lessons from abroad may be instructive, they need to be contextualized to our provincial and national realities.

- The work under consideration must be conducted in order to identify key components that can be distilled from across programs that have been successful in providing respite services that are valued by families and that support them in providing a safe and nurturing environment ²— considering who exactly is the focus of each effort.
- The move toward universal child care also signals an opportunity to move toward fully accessible and inclusive child care, as well as opportunities for earlier identification of children who may demonstrate a need for equitable access to inclusive supports and services. This project's definition of "respite services" will be crucial to assessing the impact of these policy shifts for families of CYSN, in so far as the ability to obtain suitable early child care for CYSN could have a significant impact on reducing family life stressors and and/or parental barriers to labour market participation.
- The involvement of families of CYSN ("Nothing about us, without us") is crucial to the successful design and conduct of any research project relating to respite services. However, by definition these are families who often lack the capacity or time to participate. Consultation and involvement with families must be designed on their terms and in a way that respects their capacity and minimizes demands for their time and energy.
- What is referred to as "a system of respite services" is actually fragmented – in the experience of those seeking respite services, this "system" is neither seamless, interconnected nor integrated, and can require considerable expertise and persistence to navigate. Moreover, formal respite services do not always include consideration of other, complementary services that relieve day to day stress on families such as (e.g.) homemaker support and services for healthy siblings.
- Interventions to support families who require respite services should nonetheless be considered as a system, considering the involvement of employers, community members and schools or other child care providers who are (to greater and lesser degrees) part of each family's web of support.

2. Key Deliverables

There are 3 key deliverables. The work has been divided into two phases.

In Phase 1 the focus is on documenting and synthesizing current activity and what is known about best and promising practices. The deliverables in Phase 1 are the environmental scan and the comprehensive literature review. In 2019, a current state assessment of CYSN supports and services in British Columbia was completed. A summary of this current state assessment will be shared with the successful proponent who is awarded this contract. It is expected that these findings, as they relate to respite services, will be incorporated into the environmental scan of respite services in Canada.

In Phase 2 the focus is on knowledge synthesis and the development of an options paper. It is anticipated that the paper will discuss the implications of the findings for policy and service delivery

² From the s.2 "guiding principles" in [BC's Child, Family and Community Service Act](#)

options. It is anticipated that the options paper will include recommendations for evidence based and evidence informed actions.

It will be important that a single definition of respite services and a detailed description of the population to be served be employed for all deliverables.

It is important an intersectional approach is used to guide the environmental scan and the literature review, to capture diverse experiences and perspectives of various social groups. This promotes equality and diversity of research by recognizing the complexities that influence the inquired research topic.

- Intersectionality lens
 - Intersectionality recognizes that people’s identities and social positions are influenced by multiple factors. A person’s age, disability, ethnicity, gender, gender identity, sexual orientation, and socioeconomic background shape their unique experiences and perspectives. This contributes to different living/lived experiences of individuals to other individuals who might not share all the same experiences.

Current MCFD Respite Services (BC)

Respite services currently provided by the Ministry of Children and Family and Development include:

- At Home Program
- Direct-Funded Respite
- Contracted Respite
- Respite Relief

Respite funding is intended to assist parents with some of the extraordinary costs of caring for a child with complex disabilities. This funding is to be used towards the purchase of respite services that best meet the needs of the eligible child’s family. It is not intended to replace the family’s natural support network or normative parental responsibilities.

At this time, respite funding may not be used towards the purchase of any of the following:

- childcare services that are required as a result of the parent/guardian’s employment (paid or unpaid), training, or education, and/or;
- services that are provided by any Ministry of Children and Family Development program.

The eligibility criteria for MCFD funded respite include:

- Ages 0-19
- Resident of British Columbia
- Fits within 1 of 3 Streams for eligibility:
 - 1) Documented Developmental Disability:
 - DSM IV Criteria for “Mental Retardation”
 - DSM V Criteria for “Intellectual Disability”
 - 2) Diagnosed with Autism/Autism Spectrum Disorder
 - 3) Assessed as eligible for the [At Home Program](#)

2.1 Environmental Scan: Respite Services - Canada

An environmental scan will be required in order to inform the Phase 2 knowledge synthesis and options paper. The focus of the scan should be on describing, comparing and contrasting services available, including values guiding services, factors such as eligibility for services (age range, type of disability and/or special needs and access criteria etc.), how service priority is determined, and who pays for service delivery. The scan should consider whether respite is administered and managed at the local or provincial level.

The scan should focus on creating an overview of the current respite services across Canada. The scan should compile and synthesize similar information about services provided by governments and, where available, by NGOs, private pay arrangement and informal providers in other Canadian provinces and territories.

Key Research Questions

The key research questions for this deliverable are:

- How is respite defined by families and service providers?
- How much and what type of respite is needed to support a healthy family life, family preservation and community inclusion? Does this vary based on the diagnosis or ability of the child?
- What are the strengths and weaknesses of the current respite systems across Canada?
- Do respite workers receive training prior to working with a child? Explore type of training (i.e. child specific vs. formalized general training).

2.2 Comprehensive Literature Review: Respite Services and Supports – British Columbia

A program and policy review is required to look at delivery approaches and actual family outcomes for the population under study for this project. It should be more than a bibliography or listing of sources. From a methodological perspective, a mixed studies/mixed method systematic approach is recommended, encompassing a combination of review approaches for example combining quantitative with qualitative research or outcome with process studies³.

The scope of the review must be established to encompass multiple sub-populations: while some learnings can be generalized across populations, “families of CYSN requiring respite services” is not a homogeneous group, since it encompasses multiple unique subgroups, each with varied and specific barriers and support needs. This diversity is made more complex due to other diverse and social determinant factors such as geography, culture/race, gender, education, socio-economic status and parental disability. Thus, it may be necessary to integrate sub-reviews focusing on the needs of multiple “sub-populations” as they have been well-defined, and then look for commonalities and differences across them.

The focus of the review should be on main drivers and policy directions, and the details of programs informed by these drivers within the jurisdictions scanned. The review should particularly seek out

³ *Typology Reviews: An analysis of 14 review types and associated methodologies*. Maria Grant and Andrew Booth. *Health Information and Libraries Journal* (2009). 29. pp. 91-108.

evidence generated by projects that considered local context (urban, remote and rural, cultures, etc.). Relevant literature (academic and grey literature) should look at both interventions and outcomes, and where possible consider the changing needs for respite services required by caregivers across their lifespan and/or the lifespan of their child/youth.

The review should go beyond literature on barriers, obstacles and challenges; it must focus on enablers, facilitators, strategies, potential solutions and indirect linkages around respite services that meet diverse family support needs. The unifying theme should be healthy family life and family preservation. Program and policy relevance are crucial to the utility of the review.

Key Research Questions

The key research questions for this deliverable are:

- How is respite defined by families and service providers?
- How much and what type of respite is needed to support a healthy family life, family preservation and community inclusion?
- What are best/leading practice and service models that optimize outcomes for children and families?
- How could resources be allocated to meet families' varied requirements for supports and services in order to support a healthy family life, family preservation and community inclusion?

2.3 Knowledge Synthesis and Options Paper

"A knowledge synthesis attempts to summarize all pertinent studies on a specific question, can improve the understanding of inconsistencies in diverse evidence, and can identify gaps in research evidence to define future research agendas."⁴ In this case, the synthesis should encompass synthesis of the findings from the recommended fact-finding activities – Phase 1 scan and review. The paper should then discuss the implications of these findings for providing various respite program, policy and service delivery options to be pursued in BC. The paper should consider the implications of the various options on staff workload and availability of service providers. It is anticipated that the options paper will include recommendations for evidence based and/or evidence informed actions.

Drawing on the typologies described by Kastner and colleagues⁵, the most appropriate type of knowledge synthesis might be one of ecological triangulation and interpretive synthesis, informed by both the mixed methods systematic review and grounded theorizing.

This paper should be accessible and use inclusive language.

⁴ *What is the most appropriate knowledge synthesis method to conduct a review? Protocol for a scoping review.* Kastner, M. et al., BMC Med Research Methodology. 2012; 12:144, published online. Accessed April 16, 2018 from <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC3477082/>

⁵ Ibid

3. Eligibility Criteria

Ideally, this work will be completed by a small group of experienced and knowledgeable co-authors of mixed professional and disciplinary backgrounds and demography, integrating service-sector, policy and academic perspectives.

Expert knowledge and experience with:

- Systems of care and services for children and youth with special needs
- Respite services for families of children and youth with special needs
- Conducting research literature reviews
- Completing environmental scans
- Proven track record of developing and delivering academically sound documents
- Access to an academic database

4. Contract Amount and Key RFP Dates

The maximum contract amount for this project, inclusive of all applicable fees, is \$185,000 plus taxes.

Deliverable	Minimum	Maximum
Environmental Scan: Respite Services - Canada	\$50,000	\$75,000
Comprehensive Literature Review: Respite Services and Supports – British Columbia	\$30,000	\$60,000
Knowledge Synthesis and Options Paper	\$30,000	\$50,000
Totals	\$110,000	\$185,000

The RFP timeline is summarized as follows:

Action	Date
Release of RFP	Monday, August 12, 2019
Full proposal closing date	Friday, September 6, 2019
Selection/contract negotiation commences	Monday, September 9 – Friday, September 20, 2019

5. Application Format

5.1 Page Format

To be eligible for review, all applications must adhere to the instructions for presentation and content, and must use the numbering system provided. Except for the appendices, applications must be presented as follows:

- All materials, except appendices, must be a minimum 11-point size, Calibri or Arial (regular), single spaced, on one side of a letter-sized (21.25 x 27.5 cm / 8.5" x 11") page, with a one-inch margin on all sides of the page.
- All pages should be consecutively numbered.

- All print must be black, of letter quality and easy to read.
- A header with the RFP name on the top left-hand corner, and footer with the page number on the lower right-hand corner of each page.
- The maximum page count for the application content is indicated for each phase below.

5.2 Page Count

Full proposals for this RFP must not exceed 15 pages, not including the cover letter or appendices (see 5.3 below). Additional pages beyond the maximum will be removed and shredded by MSFHR prior to review processing.

5.3 Appendices

References and charts, tables, diagrams or other materials to support the full proposals may be attached as appendices. In total appendices must not exceed 8 pages, excluding the table of contents.

6. Deliverables

6.1 Key Deliverables – Timeline

The timeline for key deliverables for this work include:

Deliverable	Delivery Date
2.1 Environmental Scan : Respite Services and Supports - Canada <ul style="list-style-type: none"> ➤ Preliminary findings – November 8, 2019 ➤ Final report – December 6, 2019 	December 6, 2019
2.2 Comprehensive Literature Review: Respite Services and Supports – British Columbia <ul style="list-style-type: none"> ➤ Preliminary findings – November 8, 2019 ➤ Final report – December 6, 2019 	December 6, 2019
2.3 Knowledge Synthesis and Options Paper <ul style="list-style-type: none"> ➤ Preliminary findings – December 16, 2019 ➤ Final report – January 17, 2020 <p>Note: If possible, it would ideal to have the knowledge synthesis and options paper completed by December 16, 2019.</p>	January 17, 2020

6.2 Accountability

Judith Hutson, Project Manager, CYSN Initiative will be the primary contact for this contract.

6.3 Progress Reporting

It is expected that there will be monthly written progress reports and monthly meetings with Judith Hutson, Project Manager, CYSN Initiative and the successful proponent’s project lead. The progress reports should include a dashboard summary of the status of the key deliverables, a brief progress summary and a list of any identified issues/concerns that will impact the timely completion of the deliverables.

7. Application Content

7.1 Contact Information

Include all information necessary to contact the designated contact person and a back-up person in case MSFHR cannot reach the designate. Either contact must be available during business hours throughout the period of review.

7.2 Business Information

Describe the business structure of the proponent individual or organization (e.g. research team, sole proprietor, independent contractor, incorporated consulting firm, not-for-profit organization etc.) including ownership and governance.

For incorporated entities, provide a CRA business number.

7.3 Proponent Leadership

Provide full details of the experience, qualifications and subject matter expertise offered by the project lead. This should include a CV/résumé, supported by up to three references from individuals with direct knowledge of the individual's relevant experience. The application must confirm that the lead has the educational, professional or other requirements necessary to deliver the identified work, including their ability to dedicate the time required to fulfill their role over the duration of the project.

7.4 Proponent's Team Members (if proposed)

Provide full details of the experience, qualifications and subject matter expertise offered by any team members who would provide services to support the project lead in the delivery of services. This should include CVs/résumés, and each may be supported by up to two references from individuals with direct knowledge of the individual's relevant experience. The application must confirm that the team members have the educational, professional or other requirements necessary to perform an identified role including their ability to dedicate the time required to fulfill their role over the duration of the project.

7.5 Declaration of Stakeholder Affiliation or Association

Identify any previous, active or anticipated relationships between the Proponent and MSFHR.

7.6 Background and Objectives

Describe your understanding of the requirements for the work including its purpose, overall scope and the objectives required (please do not copy and paste from previous sections of the RFP).

7.7 Description

Describe the approach and methodology and how it will be carried out (where, how, methods, delivery systems, personnel, etc.).

7.8 Financial Plan and Proposed Payment Terms

Describe the basis of calculating fees (e.g. monthly, daily or hourly) by person and the related billing structure proposed. A Financial Plan template has been provided in Appendix B.

7.8.1 Ineligible Expenses

The following expenses will be ineligible and should not be included:

- Rent of office premises and other related overheads (i.e. utilities).
- Capital expenses (i.e. office equipment, computer equipment and associated software).

- Travel and accommodation expenses in excess of rates approved by MSFHR according to the terms of its current Travel Policy.

7.9 Work Plan

Based on your Approach and Methodology, provide a work plan and schedule, including a breakdown of major tasks, delivery dates (milestones), and the level of effort (i.e., proportion of time) by individual team members in sufficient detail as to, (1) allow a complete understanding of how and by whom the work is to be carried out, and (2) to demonstrate sufficient availability of individual team members throughout the course of the work to ensure its successful completion.

7.10 Risks to Successful Completion and Mitigation Strategies

The purpose of this section is to provide an analysis of significant risks to the successful delivery of the identified projects and the mitigation strategies to address them. Risks to the project could include (e.g.):

- Challenges accessing data/information
- Meeting the defined delivery timelines
- Etc.

List the risks specific to the project and rate each for the likelihood of occurrence and the severity of damage should it occur (high, medium or low). Outline the mitigation strategies for each specific risk. Add additional rows as needed.

Specific Risks	Probability of occurrence (H/M/L)	Severity of Damage (H/M/L)	Mitigation strategy

8. RFP Process

The following are the conditions under which responses will be accepted from proponents.

8.1 Accountability

The primary contact person for all project-related enquiries is Judith Hutson, Project Manager cysn@msfhr.org.

8.2 Submissions

Provide one electronic copy of the proposal in PDF format only no later than 4 p.m., PST Friday, September 6, 2019. Proposals received after this time and date will not be considered. In addition, the proposal must include the signature of an authorized official of the proponent. An optional hard copy may be provided following the electronic copy in a sealed envelope and clearly identified as follows:

RFP Submission: CYSN – Respite Services
 c/o Judith Hutson, Project Manager
 Michael Smith Foundation for Health Research
 200 – 1285 West Broadway
 Vancouver, BC V6H 3X8

8.3 Enquiries

All enquiries regarding this RFP, including requests for additional information and clarification, are to be directed to Judith Hutson by email at cysn@msfhr.org no later than Wednesday, September 4, 2019.

8.4 Selection Process

Proposals will be reviewed and scored by a selection team based upon the criteria outlined below. A contract may be made solely on the basis of a proposal, without a meeting with the proponent. MSFHR reserves the right to invite one or more proponents to attend a meeting with the selection team and/or to provide written clarification of their response(s).

8.5 Selection Criteria

Full proposals will be evaluated using the following criteria:

Criteria	Weight
Merit and Feasibility of Approach	25%
Risk Mitigation	10%
Quality and Qualifications of Personnel	20%
Financial Plan and Proposed Payment Terms	20%
Work Plan	25%

8.5.1 Merit and Feasibility of Approach

- Does the proposal demonstrate a clear understanding of the requirements of the Initiative including its purpose, overall scope and objectives?
- Are the proposed data collection methods and instruments, and the mechanisms for ensuring the integrity of the data relating to progress and budget, feasible and likely to be effective?
- Is there an effective plan described for contractor oversight and collaboration?

8.5.2 Risk Mitigation

- Has the proponent provided a reasonable analysis of significant risks to the research project's development and implementation, and the mitigation strategies to address them?

8.5.3 Quality and Qualifications of Personnel

- Does the proponent team include individuals with the appropriate capabilities, experience and training to fulfill their roles?
- Are there effective governance structures and processes in place to provide oversight, advice and efficient approval of strategic and financial management decisions?

8.5.4 Financial Plan and Proposed Payments Terms

- Are the proposed financial plan (basis for calculating fees) and payment terms (related billing structure) reasonable?

8.5.5 Work Plan

- Is the work plan and schedule, including breakdown of major tasks, delivery dates (milestones), and level of effort by individual team members in sufficient detail to, (1) allow a complete understanding of how and by whom the work is to be carried out, and (2) to demonstrate sufficient availability of individual team members throughout the course of the work to ensure its successful completion?

Appendix A: Terms and Conditions

5.1 Reject Proposals

MSFHR may, in its absolute discretion, reject in whole or in part any and/or all proposals for any reason or after taking into account factors considered relevant.

5.2 Liability for Errors

While MSFHR has used considerable effort to ensure an accurate presentation of information in this RFP, the information contained in this RFP is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by MSFHR, nor is it necessarily comprehensive or exhaustive. Nothing in this RFP is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in this RFP.

5.3 Errors in Proposals

The Proponent has the responsibility, at all times, to request any instruction, decision, or direction which may be required to prepare its proposal, or to notify the designated MSFHR contact person in writing of any ambiguity, divergence, error, omission, oversight, or contradiction contained in its proposal as it is discovered.

MSFHR reserves the right to request clarification of the contents of any proposal. MSFHR may require Proponents to submit supplementary documentation clarifying any matters contained in their proposals and may seek the Proponent's acknowledgement of that interpretation. This is not an opportunity for the Proponent to submit new information modifying the proposal. Notwithstanding the foregoing, MSFHR is not obliged to seek clarification of any aspect of a proposal.

5.4 Limitation of Liability and Indemnity

MSFHR will not be obligated or liable in any way whatsoever to a Proponent except where MSFHR has awarded and entered into a written contract with that Proponent for the performance of the work contemplated by this RFP, and in

which case that contract shall govern all such obligations and liabilities.

It is a fundamental condition of this RFP and the receipt and consideration of proposals by MSFHR that MSFHR, and its respective employees, consultants and agents, will not and shall not under any circumstances, including without limitation whether pursuant to contract, tort, statutory duty, law, equity, any actual or implied duty of fairness, or otherwise, be responsible or liable for any costs, expenses, claims, losses, damages or liabilities (collectively and individually all of the foregoing referred to as "Claims") incurred or suffered by any Proponent or the Proponent's sub-contractors as a result of or related to any one or more of the RFP, the preparation, negotiation, acceptance or rejection of any conforming or non-conforming proposal, the rejection of any Proponent, or the cancellation, suspension or termination of the RFP process, and by submitting a proposal each Proponent shall be conclusively deemed to waive and release MSFHR and its employees, contractors, consultants and agents, from and against any and all such Claims.

Each Proponent shall indemnify and hold MSFHR and its employees, contractors, consultants and agents, harmless from and against any and all Claims brought against them arising out of any act or omission of the Proponent, the Proponent's sub-contractors, or by third parties arising out of or relating to the Proponent's receipt of this RFP, or the preparation, submission and negotiation of any proposal submitted by the Proponent, where such third parties were directly or indirectly engaged by or through the Proponent in connection with any of the foregoing, or where personal injury, bodily damage or property damage is caused by the negligent acts or omissions of the Proponent. Such indemnification shall survive completion of the goods or services provided under the contract and the termination of the contract.

5.5 Confidentiality of Information

This document, or any portion thereof, may not be used for any purpose other than the submission of proposals. Information pertaining to MSFHR or related parties obtained by a Proponent as a result of participation in this process is confidential and must not be disclosed except for the purpose of responding to this RFP or as required by law.

5.6 Ownership of Proposals

All documents, including proposals, submitted to MSFHR become the property of MSFHR. They will be received and held in confidence, subject to the provisions of BC Personal Information Protection Act.

5.7 Proponents' Expenses

Proponents are solely responsible for their own expenses in preparing a proposal. If MSFHR elects to reject all proposals, MSFHR will not be liable to any Proponent for any Claims, whether for costs or damages incurred by the Proponent in preparing the proposal, loss of anticipated profit in connection with any final agreement, or any other matter whatsoever.

5.8 Irrevocability of Proposal

By submission of a clear and detailed written notice, a Proponent may amend or withdraw his/her proposal prior to the closing date and time. At closing, all proposals become irrevocable. Proposals must be open for acceptance for at least 90 days after the closing. In the event that MSFHR requires more than 90 days to evaluate proposals, additional time will be requested of all Proponents.

5.9 Conflict of Interest

Proponents are responsible for disclosing to MSFHR any and all real or perceived conflicts of interest. Proposals will not be evaluated if the Proponent's current or past corporate or other interests are, in the opinion of MSFHR, deemed to be a conflict of interest in connection with this RFP or the activities or mandate of its facilities.

MSFHR reserves the right to disqualify and reject a proposal in whole or in part where the Proponent or directors, officers, shareholders or any other person associated with the Proponent has a Claim or has initiated a Claim or legal proceeding against MSFHR or against whom MSFHR has a Claim or has instituted a legal proceeding with respect to any previous contracts, tenders or business transactions. Proponents shall not engage in any form of lobbying whatsoever to influence the outcome of this RFP. Further, Proponents shall not attempt to communicate or make any representation or solicitation to any director, officer or employee of MSFHR except to the designated MSFHR contact person.

5.10 Verification

MSFHR reserves the right to verify any statement or claim contained in any proposal or made subsequently in any interview or negotiation. That verification may be made by whatever means MSFHR deems appropriate and may include contacting the references provided by the Proponent. In submitting a proposal, the Proponent is deemed to consent to MSFHR verifying any information from third parties including the Proponent's bank references, and receiving additional information regarding the Proponent, its directors, officers, shareholders or owners and any other person associated with the Proponent as MSFHR may require.

5.11 Request for Proposal Cancellation

MSFHR is not bound to accept any proposal and reserves the right in its sole and absolute discretion to postpone or cancel this RFP at any time for any reason. Further and without limiting the foregoing, MSFHR will not be bound to accept the lowest or any bid and reserves the right to accept or reject any proposal in whole or in part, to discuss with any Proponent different or additional items and terms to those described in this RFP or received in any proposal, or to amend or modify any term of this RFP. MSFHR, in its sole discretion, may invalidate and cancel this RFP entirely and may issue a new RFP if considered in the best interests of MSFHR.

No Proponent will acquire any legal or equitable rights or privileges relative to the services prior to full execution of a written agreement for the services required.

5.12 Contract Terms

By submitting a proposal to MSFHR, Proponents shall be conclusively deemed to have accepted and to have agreed to be bound by each and every term, condition, and provision of this RFP, and any services, specifications, warranties, guarantees or representations stated in the accepted proposal or made during the RFP and selection process.

5.13 Contract Award

By submission of its proposal, the Proponent agrees to negotiate in good faith and execute a contract with MSFHR incorporating the terms and conditions of this RFP, the Proponent's proposal, and such other terms and conditions as MSFHR may reasonably require. MSFHR may negotiate modifications, additions or variations to such terms and conditions or to the goods or services set out in a proposal in order to satisfy its operational or administrative requirements. The RFP and the contract, if any, entered into subsequently shall take precedence over any and all documents submitted by the Proponent. MSFHR will not accept a Proponent's standard purchase agreement.

5.14 Sub-Contracting

All sub-contractors and/or partner(s) must be identified in the proposal. No sub-contracting or assignment of any contract or of any services to be provided is permitted without the prior written consent of MSFHR. Proponents are to identify all proposed sub-contractors including the company name, contact name, phone number, fax number, email address, type of service the sub-contractor will be performing or providing, and the length of time the Proponent has been using the services of the sub-contractor. No additional sub-contractors will be added nor will other changes be made to this list without the written consent of MSFHR.

5.15 Governing Law

Proponents must comply with all applicable laws. This RFP will be governed exclusively by, and construed and enforced in accordance with, the laws of the Province of British Columbia. The Proponent agrees to attorn to the exclusive jurisdiction of the courts of the Province of British Columbia in the event of any dispute concerning this RFP or any matters arising out of this RFP.

5.16 Appendices

All appendices to this RFP are deemed to be incorporated herein and form part of the RFP.

5.17 Copyright

MSFHR shall have sole and full ownership of copyrights to and all materials produced by the successful Proponent, including a waiver of moral rights, under the contract arising from this RFP. Reproduction of any documents or other data for use by anyone is forbidden without express permission in writing by MSFHR.

Appendix B: Financial Plan Template

Item	Rate	# Hours	Total	Applicable Tax G / GP / NA *
1. Professional fees				
a) Role / describe				
b) Role / describe				
<i>Subtotal 1</i>				
2. Sub-contractors				
a) Role / describe				
a) Role / describe				
<i>Subtotal 2</i>				
3. Disbursements at cost				
a) Travel				
b) Long distance				
c) Etc.				
<i>Subtotal 3</i>				
Subtotal				
GST 6%				
PST 7%				
TOTAL PRICE				

* G = GST applicable; GP = GST & PST applicable; NA = not applicable.