

REQUEST FOR PROPOSAL

1. Invitation

United Way Centraide Canada (UWCC) and 211 Service Partners are seeking consulting services to design, develop, test and refine an online platform, with digital tools for managing, conducting, documenting and reporting on closed loop referrals¹ for upstream prevention of homelessness.

2. Background

UWCC provides national leadership and membership support for the network of local United Ways and Centraides across Canada. Together, local United Ways and Centraides (UWCs) and UWCC form the United Way Movement. UWCC is Canada's leading national network of local experts empowering people to make lasting social change in their community. With a presence across Canada, serving over 5,000 communities, our federated network of 70 local UWCs tackle the important social issues of poverty and social exclusion. UWCC is Canada's largest non-government funder of human and community services, raising over \$500M to invest each year. UWCC is the national office that provides leadership and services to UWC members across the country.

United Way is a proud founding partner of the 211 helpline in Canada, providing funding and support, and working with service partners to ensure Canadians have help with service navigation through an easy to remember 3-digit dial code. The 211 service help Canadians deal with life's challenges, connecting users with vital community resources, close to home and specific to their needs. From basic needs like housing and food, to support for seniors and children, to responding to crisis situations, 211 is there.

The 211 helpline is Canada's primary publicly funded source of information and referrals (I&R) for government and community-based, non-clinical health and social services. The 24x7, free and confidential 211 service is available by phone, with interpretations available in over 150 languages, online, and also by chat and text in many regions. The national 211 network consists of 15 non-profit organizations that provide I&R services in all 10 Provinces and 3 Territories through 12 contact centres.

UWCC and 211 Service Partners – CMHA Edmonton Region (211 AB North), Community Connections (211 ON Central East), Distress Centre Calgary (211 AB South), Findhelp Information Services (211 NB and NL), and Lakehead Social Planning Council (211 ON North), are currently carrying out a two-year pilot project to design, develop and test innovative approaches and new service capabilities in providing closed-loop referrals in four provinces – Alberta, Ontario, New Brunswick, Newfoundland and Labrador. In doing so, 211 services will have increased effectiveness in helping to keep vulnerable people who are housed in their homes, thereby achieving the goal of upstream prevention of homelessness. This project is called '*Closing the I&R Loop for Upstream Prevention of Homelessness*' and is funded by the Government of Canada's Reaching Home Program.

¹ Closed loop referrals mean the organizations who refer clients to 211 service partners for support, through outbound contacts made by 211 Navigators, are provided with the results of the contacts, after they have been completed by 211 Navigators.

3. Purpose of this Request For Proposal (RFP)

The purpose of this RFP is to seek a digital information technology consulting and development service to work with UWCC and 211 Service Partners on the two-year pilot project described in the above section, namely, the *'Closing the I&R Loop for Upstream Prevention of Homelessness'* project. Keeping top of mind the need for efficiency, sustainability, interoperability and ease of national scaling, proposals are specifically invited to:

- work with the project team to finalize requirements and determine options for a shared online platform, including requirements and options for connecting with existing digital technology resources within the 211 network;
- design, develop, test and refine a shared online platform, with digital tools, in English and French, for managing, conducting, documenting and reporting on closed loop referrals;
- design the architecture for capturing referrals, call reports, data reporting and analytics, in English and French;
- identify options to allow for data integration and interoperability with existing systems of referring partners and national scaling;
- provide complete documentation of all technical details, procedures and instructions throughout all phases of the work.

4. Scope of Work and Deliverables

Phase 1: Design, development and testing (January to May 2023)

- Components of the shared online platform will include referral management, assignment and scheduling of calls, assessment tool, call report, data reporting and sharing to support data analytics. These components need to be ready for testing from the end of March to May 2023. See below more details of the technical requirements, and there are existing digital resources within the 211 network that can be leveraged.
- Training and technical support for the 211 teams in the pilot regions will be required for the first round of piloting closed loop referrals, which is planned to start in March 2023.

Phase 2: Adjustment, enhancement, interoperability and more testing (May to November 2023)

- Based on the results and learning from the first round of piloting closed loop referrals, this phase of the work will focus on adjustments and enhancements to the shared online platform.
- Another focus of this phase of the work is interoperability between the shared online platform for closed loop referrals and existing 211 systems and systems of the project partners who are providing referrals to 211.
- Training and technical support for the 211 teams in the pilot regions will be required for the second round of piloting closed loop referrals, which is planned to start in September 2023.

Phase 3: Evaluation and sustainability (November to December 2023)

- Participation in the evaluation of the project by providing input and feedback.
- Support will be provided to UWCC and the 211 Service Partners in developing a plan for national scaling and sustainability of the shared online platform.

Requirements of the shared online platform include, but are not limited to:

- Cloud based solutions developed for this project should run on Microsoft Azure, and need to work with MS-SQL databases, and adhere to Microsoft security standards.
- Users must be able to access the online platform on desktops, laptops and mobile devices.

- The online platform should adhere to accessibility compliance requirements of all provinces and territories and any specific accessibility requirements identified by the project team.
- The shared online platform requires role based authorization and security to allow only certain users to run the tools, record interactions (including assessment responses and referrals), view call reports, and pull data reports.
- The shared online platform must have capabilities to interact with existing 211 resource databases, in order for 211 Navigators to provide appropriate referrals to services.

5. Consultant's Reporting Relationship with UWCC and 211 Service Partners

The Consultant(s) will report directly to UWCC's National Director, 211 and Community Partnerships or her designate, and be accountable to the 211 Service Partners named under section 2 above, who form the Steering Committee of the '*Closing the I&R Loop for Upstream Homelessness Prevention*' project.

6. Timeline

Proposal submission deadline	December 13, 2022, 4:00 pm ET
Interview of candidates	December 15-16, 2022
Selection and awarding of contract	By January 13, 2023
Engagement period	January to December 2023

7. Consultant Qualifications and Considerations

The following will be considered in reviewing and assessing the proposal submissions:

- Capabilities in business requirement analyses, digital solutions architecture, development and deployment, data architecture, quality assurance, security, system integration, training and support;
- Demonstrated experience in designing, development and deploying shared online platforms that are similar to the requirements stated in this RFP;
- Ability to deliver on complex projects in short time frames;
- Demonstrated experience in project management;
- Demonstrated experience in working with the non-profit sector;
- Experience in developing recommendations for data governance frameworks and working within the context of collaborative and supportive change processes;
- Knowledge of call centre operations and bilingual capacity preferred; and
- Knowledge of UWCC and the 211 network will be considered an asset.

Following the due date for this RFP, UWCC will contact suitable candidates for any additional information required. The consultant will be selected based on the quality of the proposal, budget, qualifications, and experience, at the discretion of UWCC and 211 Service Partners.

8. Contract Duration

The successful consultant will be contracted from January to December 2023.

9. Budget

The budget for this work is a maximum of **\$150,000**, excluding taxes. Please indicate if you are providing a not-for-profit rate.

The consultant must submit a detailed budget, including all fees for consulting, related expenses, and applicable taxes, specifying:

- the personnel assigned to work on the project, their hourly/daily rates and roles in relation to the deliverables and expected time commitments.

10. Instructions for Proposal Submission

All interested parties should submit a proposal *via email only*. Proposals should include the following:

- Name(s) and contact information.
- Your understanding of this project and how you would approach it with consideration for the objectives, outputs and timeline of *the Closing the I&R Loop for Upstream Homelessness Prevention* project.
- Work plan with specific timelines.
- List of individuals who will undertake this work, their qualifications (proposed roles for any/all team members should be detailed) and their resumes.
- Itemized budget.
- Descriptions (including dates) of 2-3 other projects you have worked on that are relevant to this type of work.
- Names and contact information for 2-3 clients as references.

Please note submissions should not exceed five pages in length (minimum 11 pt. font), excluding the descriptions of 2-3 sample projects and the résumés of the project team.

11. Deadline for Proposal Submission

Please submit your proposal by email only, by **4:00 pm ET on December 13, 2022** to: Judy Shum, National Director, 211 and Community Partnerships, at jshum@unitedway.ca.

12. Questions/Inquiries

Please contact Judy Shum at jshum@unitedway.ca if you have any questions regarding this RFP.