



Haldimand-Norfolk  
**REACH**

*supporting children, families, communities*

## **Haldimand-Norfolk Resource, Education, And Counselling Help**

### **Request for Proposal Microsoft 365 Migration Services**

**Issue Date:** January 31, 2025  
**Submission Deadline:** March 9, 2025 at 5:00 p.m.  
**Submission Recipient:** Brooke French, Executive Assistant  
[rfp@hnreach.on.ca](mailto:rfp@hnreach.on.ca)

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## 1.0 Proposal Invitation Summary

Haldimand-Norfolk Resource, Education And Counselling Help (Haldimand-Norfolk R.E.A.C.H.) invites qualified firms to submit proposals from qualified Bidders to drive the conversion of the existing on-premises file servers to Microsoft 365 SharePoint.

### 1.1 Definitions

Throughout this request for Proposal the following definitions apply:

**“Agency”** refers to Haldimand-Norfolk R.E.A.C.H.

**“Bidder”** means a respondent that submits a proposal in response to this Request for Proposal; **“Proposal”** means a submission in response to this Request for Proposal; **“RFP”** means Request for Proposal; **“Services”** means the work requested to be performed as per this RFP.

**“Conflict of Interest”** means any circumstances where a Bidder or any person who has the capacity to influence that Bidder’s decisions, has outside commitments, relationships or financial interests that could, or could conceivably, interfere with the Bidder’s objective, unbiased and impartial judgement relating to H-N R.E.A.C.H. An apparent conflict of interest is one in which a reasonable person would think that the professional’s judgment is likely to be compromised.

## 2.0 Organizational Profile

Haldimand-Norfolk R.E.A.C.H. is a multi-service agency, providing children’s mental health services, developmental services, autism and behaviour services, youth and justice services, adult counselling, a residential program for transitional-aged youth and several early learning and care services including licensed childcare, EarlyON Child and Family Centre(s) and the Community Action Program for Children. Haldimand-Norfolk R.E.A.C.H. serves as the Lead Agency for; the Hamilton/Niagara Regional Student Nutrition Program; Child and Youth Mental Health Services under the Moving on Mental Health initiative; and Coordinated Service Planning under the Ontario Special Needs Strategy. Through our Contact Division, the Agency serves as the single point of access for children’s mental health and developmental services as well as coordinating the local Service Resolution Mechanism and Complex Special Needs process.

Haldimand-Norfolk R.E.A.C.H. is recognized as a local leader in community education, advocacy, inter-sector collaboration and Community Service Planning. The Agency’s administrative office is located at 101A Nanticoke Creek Parkway, Townsend. Other Agency locations include 12 EarlyON Child and Family Centres, a youth residence program located in Simcoe; satellite service locations at 228 John Street, Simcoe and 110 Ramsey Drive, Dunnville, as well as a number of partner and leased locations throughout the Haldimand and Norfolk Counties. The website is [www.hnreach.on.ca](http://www.hnreach.on.ca).

The Agency has an annual operating budget of \$15 million and employs approximately 180 full and part time staff.

For your reference, please see [Appendix A](#) for H-N R.E.A.C.H.’s Organizational Chart for 2024/2025.

### 3.0 Expected Deliverables

The Bidder will adhere to all guidelines, timelines and requests specified in this RFP.

Deliverables include but are not limited to:

- **Project Management and Implementation:** Manage the full migration process from on-premises systems to Microsoft 365, including SharePoint, Teams, and other Office 365 applications.
- **Data Migration and Integration:** Securely migrate all data, folders and documents from our Active Directory and File servers, with no or minimal downtime. For reference, please see [Appendix B](#) for a current sample list of folders from our Active Directory and File servers.
- **Configuration and Optimization:** Configure Microsoft 365 to suit H-N R.E.A.C.H.'s needs, ensuring full utilization of tools such as Teams for collaboration, SharePoint for document management, and integration with existing systems.
- **Training and Change Management:** Software professional trainers to provide user training and change management to facilitate a smooth transition and adoption across the organization.
  - Develop a comprehensive Training Plan in SharePoint, Teams and basic, intermediate and advanced training of a minimum of 5 additional application components of Microsoft 365 to include Word, Excel, PowerPoint, Forms.
  - Deliver user training sessions.
- **Ongoing Support Post-Migration:** Offer support for a period of 3 to 6 months (or to the satisfaction of the agency), with the ability to extend the timeframe, to optimize Microsoft 365 usage and troubleshoot any issues that arise post-migration.

### 4.0 Agency Preparedness

The following steps have been taken to prepare the Agency for the transition:

- The Agency has a Microsoft 365 Tenant with Azure AD sync occurring. SSO is setup for all licensed users.
- Currently we have all locally installed Office 365, subscription includes E1 (charity) 89 Microsoft 365 Business Premium, 96 Microsoft 365 Business Standard, 100 Business Basic, 25 Nonprofit Portal.
- H-N R.E.A.C.H. will be fully migrated to Exchange 365 by March 7 2025, with no on premise mail server.
- The Agency has not utilized SharePoint or Teams with the exception of two SharePoints created as pilot projects. All data is retained on an on-premise file server utilizing security groups in AD.
- Teams is not currently utilized by the Agency. The implementation of Teams will be for the purpose of collaboration, communication (messaging, virtual meetings). The Agency will not utilize the public telephone capabilities within this Scop of Work (S.O.W.).

## 5.0 Guidelines

### 5.1 Key Haldimand-Norfolk R.E.A.C.H. Contact

Brooke French, Executive Assistant, will be the sole Haldimand-Norfolk R.E.A.C.H. contact for this proposal. Direct all inquiries related to this RFP to:

**Email:** [rfp@hnreach.on.ca](mailto:rfp@hnreach.on.ca)

**Telephone:** 519-587-2441 Ext. 346

### 5.2 RFP Questions and Answers

Each Bidder is solely responsible for ensuring that it has all information necessary to prepare its proposal and for independently verifying and informing itself with respect to any terms or conditions that may affect this proposal.

Questions and requests for clarification must be submitted via email to [rfp@hnreach.on.ca](mailto:rfp@hnreach.on.ca).

Deadline to submit questions or requests for clarification will be February 28, 2025 at 5:00 p.m. Answers and clarifications will be posted as an addendum to this RFP.

### 5.3 Acceptance of Proposal

Haldimand-Norfolk R.E.A.C.H. reserves the right to reject any or all proposals or to accept the proposal(s) deemed most favorable to Haldimand-Norfolk R.E.A.C.H. All proposals must include a statement of authorization to submit a proposal signed by a principal of the Bidder.

Following the evaluation of the submitted proposals, Haldimand-Norfolk R.E.A.C.H. may consider entering into negotiations for a contract with any prospective Bidder it believes best meets the needs and expectations and offers the best overall content and value. The solicitation of proposals does not in any way commit Haldimand-Norfolk R.E.A.C.H. to accept any proposals or to commence negotiations with any Bidder, and the submission of a proposal does not constitute a legally binding agreement between Haldimand-Norfolk R.E.A.C.H. and any Bidder.

Haldimand-Norfolk R.E.A.C.H. reaffirms its right to make any selection it deems prudent and responding firms or individual participants acknowledge through their participation that such selection is not subject to protest or contest. Haldimand-Norfolk R.E.A.C.H. is not bound to negotiate with the lowest costs or any Bidder.

Haldimand-Norfolk R.E.A.C.H. reserves the right to:

- Not award a contract as a result of this RFP;
- Award contracts to one or more Bidders;
- Modify the tasks based on negotiation with Bidders and/or reduce scope based on proposed costs or any other reason;
- Withdraw this RFP, and/or any item within the RFP at any time without notice;

The successful Bidder will be required to enter into an agreement with Haldimand-Norfolk R.E.A.C.H. for the provision of the Deliverables.

## 6.0 Proposal Requirements

### 6.1 Conflict of Interest

The Bidder must declare any actual, potential or apparent conflict of interest related to working on this project in their submission.

### 6.2 RFP Submissions

The Bidder shall not modify or withdraw its proposal without Haldimand-Norfolk R.E.A.C.H. consent for a period of thirty (30) days after the closing date.

The Bidder's proposal must include and address the following:

#### a) Technical Proposal

- Introduce the organization and its capabilities.
- Provide a statement declaring the Bidder has no conflict of interest or declaration of actual, potential or apparent conflict of interest.
- Provide a description of the Bidder's history, experience and recent relevant work demonstrating the Bidder's ability to meet the timelines as set out herein.
- Demonstrate understanding of the scope and provide a description of Bidder's abilities related to the service.
- Clearly outline if any services will be outsourced.
- Identify the person(s) who would be involved, their proposed role, and their experience and qualifications to fulfill that role.
- Describe any professional and technical services, including use of AI, that will be called upon to assist in the scope of this service.
- Provide a proposed timeline and detailed description of the strategy and processes for each component of the deliverables outlined above (section 3.0).
- Include at least three (3) client references who may be contacted to confirm the satisfactory delivery of like services/projects by key team member(s). Information regarding each reference should include the individual's name, position, address, phone number, email address and a brief description of the work completed.
- Provide a description of any value-added services.

#### b) Financial Proposal

The financial proposal must include all Bidder costs associated with meeting all deliverables and requirements. It must include a detailed breakdown of costs associated with each expected deliverable.

Specify any bundled service discounts or not-for-profit pricing.

Respondents may propose to invoice on an interim or final cost basis. All invoices must clearly identify the costs associated.

### 6.3 Mandatory Requirements Check

Submissions that do not include the mandatory information below may not be scored and can be rejected:

1. Service proposed work plan and timeline.
2. Service methodology proposed to complete the expected deliverables.
3. A cost quotation that has all-inclusive costs for the proposed work which will be performed within the timeline.
4. Identification of those on the team who will be involved with the project which should include their role, the process and experience.
5. Costs identified in the proposal that clearly establish the basis of remuneration identifying both the hours of work and hourly rates for appropriate categories of staff and appropriate out-of-pocket expenses. Costs and timeline aligned with expected deliverables.
6. Disclosure statement: any actual, potential or apparent conflict of interest.

## 7.0 Evaluation Process and Criteria

The evaluation process to determine the successful Bidder(s) will involve both qualitative and quantitative elements. As a general framework, all proposals presented by Bidders will be evaluated in the context of the overall value that it brings to the agency.

The evaluation process will include individual committee member's evaluation and rating of each proposal, followed by committee discussion and ranking of proposals. After preliminary rating and ranking of proposals, interviews will be scheduled with finalists. References will be contacted for all finalists.

The final recommendation of the agency is not subject to appeal. All Bidders will receive written notification of Haldimand-Norfolk R.E.A.C.H.'s decision regarding their proposal.

Additional information may be required from the selected bidder prior to the awarding of the project. Any information withheld or omitted, or failure to disclose any history of deficiencies shall disqualify the bidder from award of the project and/or contract. Haldimand-Norfolk R.E.A.C.H. reserves the right not to select a bidder for project implementation if, in its determination, no qualified bidder has applied or is sufficiently responsive to the project need.

Where no satisfactory proposal is received, Haldimand-Norfolk R.E.A.C.H. reserves the right to cancel this RFP process, request re-bids, or negotiate a contract for the whole or any part of the provision of the required service as outlined in this RFP.

In the event that no proposal is selected, Haldimand-Norfolk R.E.A.C.H. may elect to issue a new RFP to attempt to expand the pool of potential respondents.

### 7.1 Evaluation Criteria

The following Pass/Fail Criteria will be applied to all proposals:

Pass/Fail Criteria:

- |  |           |
|--|-----------|
| Proposal received on time in electronic (PDF) format                         | Pass/Fail |
| Disclosure statement: any actual, potential or apparent conflict of interest | Pass/Fail |

Bidders must achieve the Pass Criteria before Haldimand-Norfolk R.E.A.C.H. will consider the Technical Criteria.

Bidders must achieve a rating of 75% or more (a score of 60 out of 80) on the Technical Criteria before Haldimand-Norfolk R.E.A.C.H. will consider their Financial Criteria.

Proposals will be reviewed and ranked on the following criteria and scored out of a 100 point total as follows:

<b>Technical Ranking Criteria</b>	<b>Percentage</b>
Demonstrated understanding of expected deliverables	20%
Approach and methodology	20%
Qualifications of project team and organization's relevant experience with like services and projects	15%
Project timelines	10%
Interview	10%
References	5%
<b>Total Technical</b>	<b>80%</b>

<b>Financial Ranking Criteria</b>	<b>Percentage</b>
Hourly, project rate, affordability, estimated expenses (including detailed breakdown of costs associated with each expected deliverable).	20%
<b>Total Financial</b>	<b>20%</b>

All proposals will be reviewed and scored against the evaluation criteria as described above by the evaluation committee assigned to this RFP.

## 7.2 Method of Resolving a Tie Score

- Highest score in the “Demonstrated understanding of expected deliverables and approach to methodology” Technical Criteria will be used to determine the successful Bidder.
- If this is tied, the highest score in the “Qualifications of project team and firm’s relevant experience” Technical Criteria will be used to determine the successful Bidder.
- And if this is tied, the highest score in the References will be used to determine the successful Bidder.

## 8.0 Application Procedure

Interested Bidders shall submit an electronic version of all required documentation in PDF format. Should you require an alternative format/mode of submission, please contact the individual named above.



All proposals must be submitted electronically to the attention of Brooke French, Executive Assistant at [rfp@hnreach.on.ca](mailto:rfp@hnreach.on.ca).

Packages received after the closing time (5:00 p.m.) will not be accepted.

Haldimand-Norfolk R.E.A.C.H. reserves the right to amend this RFP document through written addendum, up to three (3) business days prior to closing time.

## 8.1 Electronic Bid Submission and Timeline

The Bidder shall not modify or withdraw its proposal without prior consent from Haldimand-Norfolk R.E.A.C.H. for a period of thirty (30) days after the closing date.

The contract will ideally commence April 1, 2025<sup>1</sup>.

The RFP tentative timeline is as follows:

Request For Proposal opens to tender:	January 31, 2025
Deadline for questions, clarifications:	February 28, 2025 at 5:00 p.m.
Bidder submission deadline:	March 9, 2025 at 5:00 p.m.
Interviews for selected Bidders	March 18/20, 2025
Bidder selected and notified:	March 25, 2025
Contract start date:	April 1, 2025 <sup>2</sup>
Contract completion (preferred):	As per bidders timeline for the completion of proposed work.

The RFP timetable is tentative only and may be changed by Haldimand-Norfolk R.E.A.C.H. at any time.

Submitted application packages do not in any way constitute a binding agreement between Haldimand-Norfolk R.E.A.C.H. and any bidder. Haldimand-Norfolk R.E.A.C.H. shall not be obligated in any manner to any Bidder, unless and until a written contract has been duly executed between Haldimand-Norfolk R.E.A.C.H. and the successful bidder.

## 8.2 Conditions of Proposal

All costs incurred in the preparation of a response to this RFP are the responsibility of the Bidder and will not be reimbursed by Haldimand-Norfolk R.E.A.C.H.

Late or incomplete applications will not be accepted for review and rating. Any proposal may be disqualified if it deviates from the submission instructions in the RFP.

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<sup>1</sup> Timeline subject to negotiation based on bidder proposal.

<sup>2</sup> Contract start date is subject to negotiation based on bidder proposal.

### **8.3 Ineligibility**

Under the following conditions, an individual or entity is ineligible to be a Haldimand-Norfolk R.E.A.C.H. Bidder, and therefore may not submit a proposal.

- Haldimand-Norfolk R.E.A.C.H. employees and Board members and their immediate family

### **9.0 Ownership and Confidentiality**

All data, documentation, information, notes, completed questionnaires, reports, analyses, intellectual property or other material produced for or in conjunction with, created as a result of, or otherwise associated with H-N R.E.A.C.H. and the services to be provided under this RFP and the contract made hereafter, shall remain the property of H-N R.E.A.C.H.

Any and all information relating to H-N R.E.A.C.H., which is made known to the bidder in the course of providing service to H-N R.E.A.C.H., shall remain confidential to all parties. The RFP process in its entirety shall also remain confidential to all parties. The bidder shall abide by all applicable Provincial and Federal laws and regulations concerning the handling and disclosure of private and confidential information.

By acceptance of this document, the recipient agrees to be bound by the aforementioned statements.

### **10.0 Indemnification**

The Bidder shall hold Haldimand-Norfolk R.E.A.C.H. as well as the Board of Directors and employees of Haldimand-Norfolk R.E.A.C.H. harmless and shall indemnify any and all awards and costs related to any claim or action brought against any of them for property damage, bodily injury, death or other causes, as a result of responding to this RFP or a service provided to Haldimand-Norfolk R.E.A.C.H. by the Bidder.

### **11.0 Assignment**

The Bidder shall not assign or transfer all or any part of its rights or obligations under this agreement without the prior written consent of Haldimand-Norfolk R.E.A.C.H.

### **12.0 Governing Law**

This Agreement shall be governed and construed in accordance with the laws of the Province of Ontario.

# 13.0 Appendix A: Haldimand-Norfolk REACH Organizational Chart 2024/2025

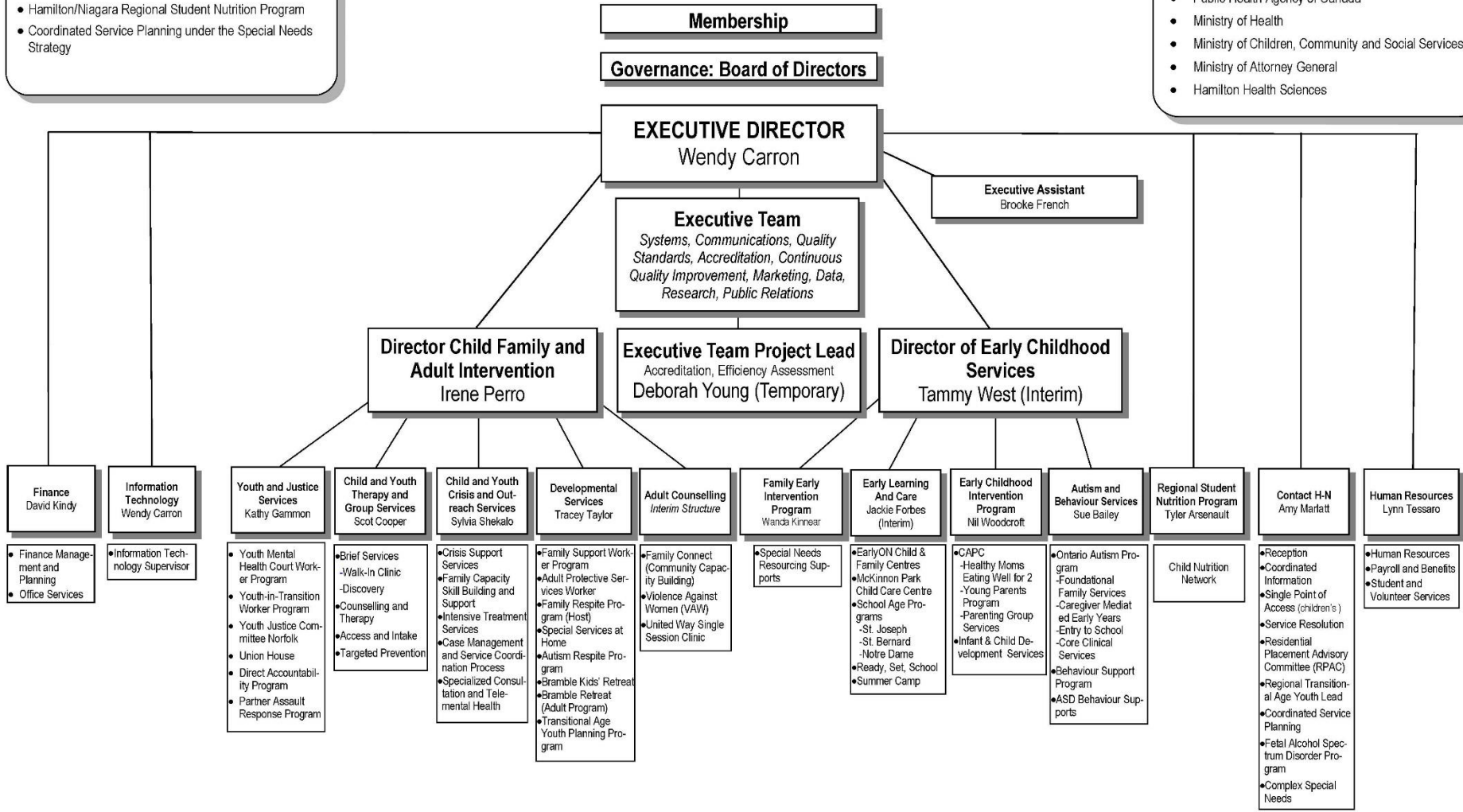
**Haldimand-Norfolk REACH is Lead Agency for:**

- Child and Youth Mental Health Services
- Hamilton/Niagara Regional Student Nutrition Program
- Coordinated Service Planning under the Special Needs Strategy

## Haldimand-Norfolk REACH 2024/2025 Organizational Chart

**FUNDERS**

- Counties of Haldimand and Norfolk
- United Way of Haldimand and Norfolk
- Public Health Agency of Canada
- Ministry of Health
- Ministry of Children, Community and Social Services
- Ministry of Attorney General
- Hamilton Health Sciences



## 14.0 Appendix B: List of Current Server Folders

Below is a list of current folders on the file server. Each folder represents a Unit/program, a restricted folder or a folder that is shared with more than one unit/program. Each of these would be considered a SharePoint (file storage).




























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Name

- Agency Projects
- Archived Client Database
- Autism Finance
- Autism Reporting
- Autism Unit
- Bramble Retreat
- Clerical
- Clinical Unit
- Complex Special Needs
- Computers
- Confidential Financials
- Contact
- Developmental Services
- Early Childhood Intervention Programs
- Early Learning and Care Unit
- ELC-ECIP
- Everyone
- Executive Director Files
- Executive Team
- Extensive Needs Service
- Family Services
- Family Services Receivables
- Finance
- Historical records search
- HR-Payroll
- Human Resources
- Management
- Manager Supervisor
- Marketing
- Norfolk County
- Printer Drivers
- Recruitment
- Regional SNP
- SNP Finance
- Supervisors
- Union House
- Wendy-Brooke-Harold
- Wendy-Irene-Diane
- Youth Justice Services

The following is a list of the committees and projects currently active throughout the Agency. These would be considered Microsoft Teams sites where a small group will be connected to collaborate, create, exchange ideas and track status.

Name ^

-  Agency Accreditation
-  Agency Policy Administration
-  Archival Information Project Team
-  Archiving
-  CARE
-  Change Work
-  CMH Statistics
-  Coordinated Service Planning
-  Covid-19 Transition Team
-  DdD
-  Diversity Equity and Inclusion Committee
-  Electronic Signatures
-  Engagement Committee
-  Evaluation Project
-  Evidence Informed Practices
-  Information Network of BHN
-  Open House
-  Outdated 2014 Service Coordination Project Team
-  Pathways
-  Policy Review Committee
-  Professional Learning Committee
-  Psychological Health & Safety At Work Committee
-  Sage HRMS Project
-  Social Media Committee
-  Solution-Focused Champions
-  Targeted Prevention Work
-  WAH Committee
-  Website Project