



## **Request for Proposals (RFP) for a Client Information System (CIS)**

**Issued:** February 22, 2023

**Application Deadline:** April 7, 2023

**Please submit intent to bid and  
electronic proposals to:**

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## 1. Introduction

### 1.1 Background

Lumenus Community Services (hereafter called Lumenus) is issuing a Request for Proposal (RFP) to experienced, interested proponents and publicly, inviting them to submit proposals to provide a Client Information System with implementation.

### 1.2 Definitions

In this RFP, unless the context requires otherwise:

- **“CIS”** has the meaning set out in Section 2.1.
- **“Claim”** means to state or assert that something is the case, typically without providing evidence or proof; in addition, described in Section 5.13.
- **“Clarification Requests and Questions”** means request form submitted to provide more information.
- **“Closing Time”** has the meaning set out in Section 5.1.
- **“Contract”** means the contract to be awarded to the Preferred Proponent pursuant to this RFP.
- **“Deliverables”** has the meaning set out in Section 2.3.
- **“Evaluation Committee”** is a committee of one or more persons appointed by Lumenus to review the Proposals.
- **“Intent to Bid Deadline”** means the last date and time the Proponent should submit an intent to bid confirmation email on the RFP, as specified in Section 6.
- **“Preferred Proponent”** means the Proponent recommended by the Evaluation Committee to be awarded the contract.
- **“Procurement Officer”** is the person identified in Section 5.4.

- “**Proponent**” has the meaning set out in Section 1.3.
- “**Proposal**” has the meaning set out in Section 1.3.
- “**Proposal Price**” is the total estimated price submitted by a Proponent.
- “**Questions & Answers**” has the meaning set out in Section 5.5.
- “**RFP**” means this Request for Proposal
- “**Shortlisted Proponents**” has the meaning of the three (3) highest scoring Proponents in the Evaluation Process.

Any words or phrases defined elsewhere in this RFP will have the meaning assigned to such words or phrases.

### 1.3 Eligibility to Participate

Any interested party (each, a “**Proponent**”) who has experience with business process as well as technical consulting, training, and support services in relation to Client Information Systems may submit a proposal (a “**Proposal**”) in response to this RFP.

### 1.4 About Lumenus Community Services

In April 2020, Lumenus was created from the amalgamation of four well-respected and long-serving, multi-service delivery agencies, Adventure Place, The Etobicoke Children’s Centre, Griffin Centre and Skylark Children, Youth and Families. Lumenus has an associated foundation which is currently named the Lumenus Foundation.

Our vision is to provide excellent, accessible, and integrated mental health, developmental and community services. Where there are gaps, we will create seamless connections – where there are obstacles or barriers, we will improve access. Where there is worry, there will be hope. We will do this in collaboration with our clients and partners. That is the bright future of Lumenus – where every client has the opportunity ***to be seen, be heard and to be well.***

We support infants, children, transitional-aged youth, adults, and their families and caregivers, with a focus on improving their development and mental well-being. We have a dynamic vision to be a modern, integrated organization committed to excellence and meeting the needs of our existing and future clients and population.

Lumenus has over 500 employees that capitalize on our collective strengths, core values and areas of expertise to provide a quality, integrated, continuous system of much needed accessible services. Our integrated continuum of services includes early intervention, counselling, day school treatment, live-in treatment services, and specialized services for clients with complex needs and autism. Specifically, we will be leaders in the development of a unique and broad continuum of service models for:

- Infants and young children (0-6 years) and their parents
- Children and youth with developmental disabilities and autism (0-18 years)
- Children and youth with mental health concerns (0-25 years) and
- Adults with developmental disabilities (16+ years)

We operate from 38 locations in Toronto, East York, Etobicoke, North York, Richmond Hill, and Scarborough. These include residential, commercial, community and school sites. We also work with school boards and individual schools to support individuals in sectioned classrooms. The number of Lumenus locations will fluctuate (by 3 to 5) year over year.

Lumenus is mainly funded by the ministry of Health and Ministry of Children, Community and Social Services. In addition, many other funders and donors provide support and funding to Lumenus. Lumenus also provides fee for service programs, for services not supported by main funders.

## 2. Description of RFP

### 2.1 Objective

Lumenus's objective for this RFP is to procure a product and service from a qualified Proponent to implement a single integrated Client Information System (“**CIS**”).

## 2.2 Scope of Services

Lumenus is seeking proposals from qualified Proponents to obtain and implement a single, cohesive, integrated Client Information System (CIS) that supports staff and clients' needs across Lumenus and is aligned with service delivery models and business processes.

Lumenus currently works with two main Client Information Systems to manage and document clinical and administrative information across multiple programs and services. This includes CR which stands for 'Client Record' and CYSIS which stands for 'Children & Youth Services Information System'. We currently use one CR and four separate CYSIS databases which were used by the legacy organizations pre-amalgamation. In addition, Lumenus employees enter data into a few other information systems/databases including but not limited to SurveyMonkey, KoNote, and Microsoft Excel spreadsheets. Few of the Lumenus services are also required to enter data to external databases based on the requirements from the funders.

Lumenus is requesting proposals for the purchasing/licensing, implementation, and support services of a Client Information System to replace the functions currently provided by CR, CYSIS, and other systems along with some additional capabilities. The single solution must meet Lumenus's operational, funder reporting, data management and client-interface needs as specified in "Supporting Document D - CIS Functional and Non-Functional Requirements". The Proponent's proposal must include a comprehensive implementation plan which includes the general approach, project management, project resources, anticipated timelines, organizational change management, key milestones, end-user training and education plans. We are seeking a work plan, approved by Lumenus, that enables the organization to "Go-Live" with the single, cohesive CIS in the most efficient and timely manner.

The scope and requirements of services expected from the Proponent will include but may not be limited to:

- The provision and implementation of a Client Information System (CIS) solution that meets Lumenus's needs and aligns with the following specifications:

- Roughly drafted Current State Business Processes (Section 3. Current Infrastructure and Details) which will be reviewed, enhanced, and evolved into future state business processes
- Interface and Integration Requirements (Supporting Document C)
- CIS Functional and Non-Functional Requirements (Supporting Document D)
- Reporting Requirements (Supporting Document F)
- The proposed solution must be compliant with Lumenus policies and the following privacy, security and Canadian data residency/management requirements including:
  - *Canada's Personal Information Protection and Electronic Documents Act (PIPEDA)*
  - *Ontario's Personal Health Information Protection Act (PHIPA)*
  - *Accessibility for Ontarians with Disabilities Act (AODA)*
  - *Freedom of Information and Protection of Privacy Act (FIPPA)*
- The Proponent must not only provide the CIS solution but should also support the customization, implementation, system integration, data migration, reporting per main funders requirements, onboarding, training, and project management of implementation of the new solution.
- The proposed solution must be manageable, supportable, cost feasible, without operational Proponent support or additional capital funding. All operating expenses and requirements must be clearly defined.

### 2.3 Project Deliverables

The deliverables mean the goods, services and/or construction that are the subject of and described in this RFP. The deliverables are subject to the terms of this RFP, the finalized contract, and are to be provided by the Preferred Proponent to Lumenus.

The Preferred Proponent is expected to develop, provide, and complete the following deliverables:



### 2.3.1 Software Configuration

- A configured and customized software solution which will best align with future business processes, that the Preferred Proponent will participate in reviewing prior to implementation.
- Develop custom workflows and solutions if required for processes not supported by the Preferred Proponent's proposed solution.
- Perform Data Migration from existing two systems (5 databases) and Excel spreadsheets.
  - Currently we have approximately 49,000 unique clients recorded across 5 databases from which around 3800 of them are currently active. We serve around 10,000 unique clients annually, from which, 4000 are new.
- Develop main funders related and required reports, as mentioned in Section 3.3, and as per "Supporting Document F – Lumenus Reporting Requirements, Main Variables, and Indicators" as well as:
  - Standard Operational Reports to extract data for main indicators on a frequent basis
  - MOH and MCCSS Transfer Payment Ontario (TPON) related reports
  - Business Intelligence (BI) reporting to the Ministry of Health (MOH)
- Test database with a Lumenus internal team prior to "Go-Live" launch
- Final working CIS product

### 2.3.2 Technical Infrastructure

- If the solution is a Lumenus on-premises solution, the Preferred Proponent must provide the hardware and software specifications to allow the Lumenus Information, Communications and Technology (ICT) team to cost, procure, and configure the required infrastructure to support the proposed CIS. All costs to provide the hardware and software, while may not be in scope of the RFP and may be the responsibility of Lumenus, will be considered in the scoring of the proposed solution.

- If the proposed solution is a cloud-based (SaaS) platform, the Preferred Proponent must provide complete details of the hosting environment to show how it complies with Lumenus's current security, privacy, and performance requirements.
- Ongoing software upgrades

### 2.3.3 Project Management

- A thorough and detailed Integrated Project Plan including Project Management, Change Management, Communication Approach and Plan, Implementation Plan and Timelines specific for Lumenus. This should include Proponent's expectations from Lumenus team on what is required for effective implementation of the solution.
- In collaboration with the Lumenus, the selected Proponent will provide a project manager resource which will participate in:
  - Development of a detailed Integrated Project Plan
  - Development of relevant technical standards and documentation
  - Development of project timeline and schedule (in effort hours) with clearly defined assumptions and requirements from Lumenus for fulfilling the timelines.
  - Task management
  - Generation and production of project artifacts such as: resource timesheets, risk and issue management logs, milestone reporting
  - Development of Communication Plan with key Lumenus resources in collaboration with Lumenus team.
  - Communications to key stakeholders
  - Standardized Project Management Project status reporting for Executive Leadership Collaborative and the Board of Directors as appropriate.

### 2.3.4 Transition and Training

- Post-launch troubleshooting
- Comprehensive Training Plan including:
  - Complete application and customizations training for Organizational Excellence Department (OED) team members, including knowledge

- transfer for daily operations, support methodology, customizations, how to design reports, extract and analyze data, and fulfill reporting requirements
- Training for Systems Administrators and ICT Support Staff.
- Initial core application training for 500+ users which enables users to perform their functions in a timely manner.
- Training material for onboarding purposes
- Design and provide self-help materials including user guides, FAQs, and instructional videos.
- Fully developed documents in collaboration with Lumenus including:
  - Access controls, privacy, and security settings
  - Business rules
  - Data Dictionaries
  - Software Maintenance Plans
  - Clear, high-quality information about the main funders and relevant ministries' reports
- Complete Transition Plan from project to operations including full knowledge transfer for ICT and OED Handoffs, including training on system maintenance and otherwise, as needed, a data backup and business continuity strategy, and fully defined technical systems requirements.

### 3. Current Infrastructure and Details

The new Client Information System would be a replacement for the current infrastructure including CYSIS, CR, and Excel spreadsheets as specified in “Supporting Document C – Integration and Interface Requirements”. This one cohesive system would interface with Microsoft Office 365, SurveyMonkey, SAGE, Blackbaud products, ADP WFN. We would like to reduce duplicate entry in external databases by interfacing with the following applications: EYSIS, ISCIS, TPH ISCIS Form, Dacima, Pirouette (Roxy Software), CAFAS, BCFPI, and OR. These external databases would require application programming interfaces (APIs) to be built where possible, and custom forms and tables are created to accommodate the data structure required by these systems.

### 3.1 Information, Communications, and Technology

Lumenus is a Microsoft Windows 10 LTSC, Windows server 2016/2019/2022, VMware, iPhone 13 and Azure based organization. Ideally, Lumenus will have the ability to use current Active Directory user profiles, FOB/Swipe access cards, with the same or better security parameters (such as MFA) that are currently in place. The procurement of the Microsoft, VMware, Azure, and core software costs are not in scope of this RFP but must be clearly identified if required. In addition to the above, Lumenus core software's are Adobe Acrobat, Trend Micro Apex One, and all the Microsoft 365 application suite. The Proponent is fully responsible to ensure complete and seamless integration with the above environment and identify and pre-test any additional integration requirements.

The proposed solution must be technologically secure, reliable, compliant, feasible and efficient. The proposed solution and architecture must not only be compatible with our current working environment but must be supportable by the Lumenus ICT Team. A more detailed set of requirements can be found in "Supporting Document D - CIS Functional and Non-Functional Requirements".

### 3.2 CYSIS and CR

The two primary databases that are serviced by the Organizational Excellence Department (OED) at Lumenus are CYSIS and CR. There are four instances of CYSIS and one CR. There are a lot of challenges in using multiple platforms and databases for Lumenus employees. For example, currently there is no continuity or consistency between the databases in terms of client ID numbers and it is time consuming for employees to find all information on a client in all databases. In addition, in each database, similar services and activities have different structures and naming. The Organizational Excellence Department (OED) is responsible for day-to-day operations of these databases as well as access management, initial and ongoing training, customization, and changes to these databases.

The OED is also responsible for producing all reports needed in the organization. Self-service options for running some reports are currently available to management and clinical staff, however due to a high-level of workload, use of these self-service options is minimal. Currently, Excel and Power BI are often used to provide data summaries and

visualization. Changes can be added to the databases and reports by submitting a request to the OED. Once a change request is approved by a clinical director, the OED will review and analyze the request to ensure that by making the change or including the addition, the integrity of the database and system are maintained. The OED is uniquely positioned as they have a complete and global understanding of all databases. The recommendations of the OED are vital to the health of the database for Lumenus. Table 1 includes our total number of unique clients and active clients within the CYSIS and CR data systems.

Table 1: Number of Unique Clients

| <b>Name of the Database</b>         | <b>Type of Database</b> | <b>Total Unique Clients as of January 31, 2023</b> | <b>Active Unique Clients as of January 31, 2023</b> |
|-------------------------------------|-------------------------|--|---|
| Adventure Place                     | CYSIS                   | 13,134   | 1,793   |
| Etobicoke Children's Centre         | CYSIS                   | 11,952   | 736   |
| Skylark Children, Youth, & Families | CYSIS                   | 13,878   | 402   |
| Special Needs Team (SNT)            | CYSIS                   | 755  | 165   |
| Griffin Centre                      | CR                      | 8,267  | 712   |
| <b>Total</b>                        |                         | <b>47,986</b>                                      | <b>3,808</b>  |

On average, the organization provides services to 4,061 new clients per year and serves approximately 10,000 clients in total annually. Total visits and contacts with clients are approximately 120,000 per year. The following diagram shows the overall service delivery process at Lumenus. The three main components of the process are Client Placed, Program Participation, and Discharge (Figure 1: High Level Process Diagram). The detailed components of the process changes based on the specific programs which are offered (Figure 2: Detailed Current Business Process).

Figure 1: High Level Process Diagram

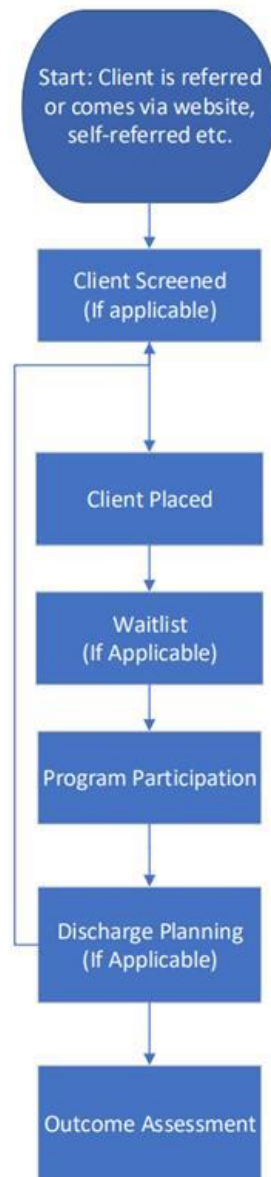
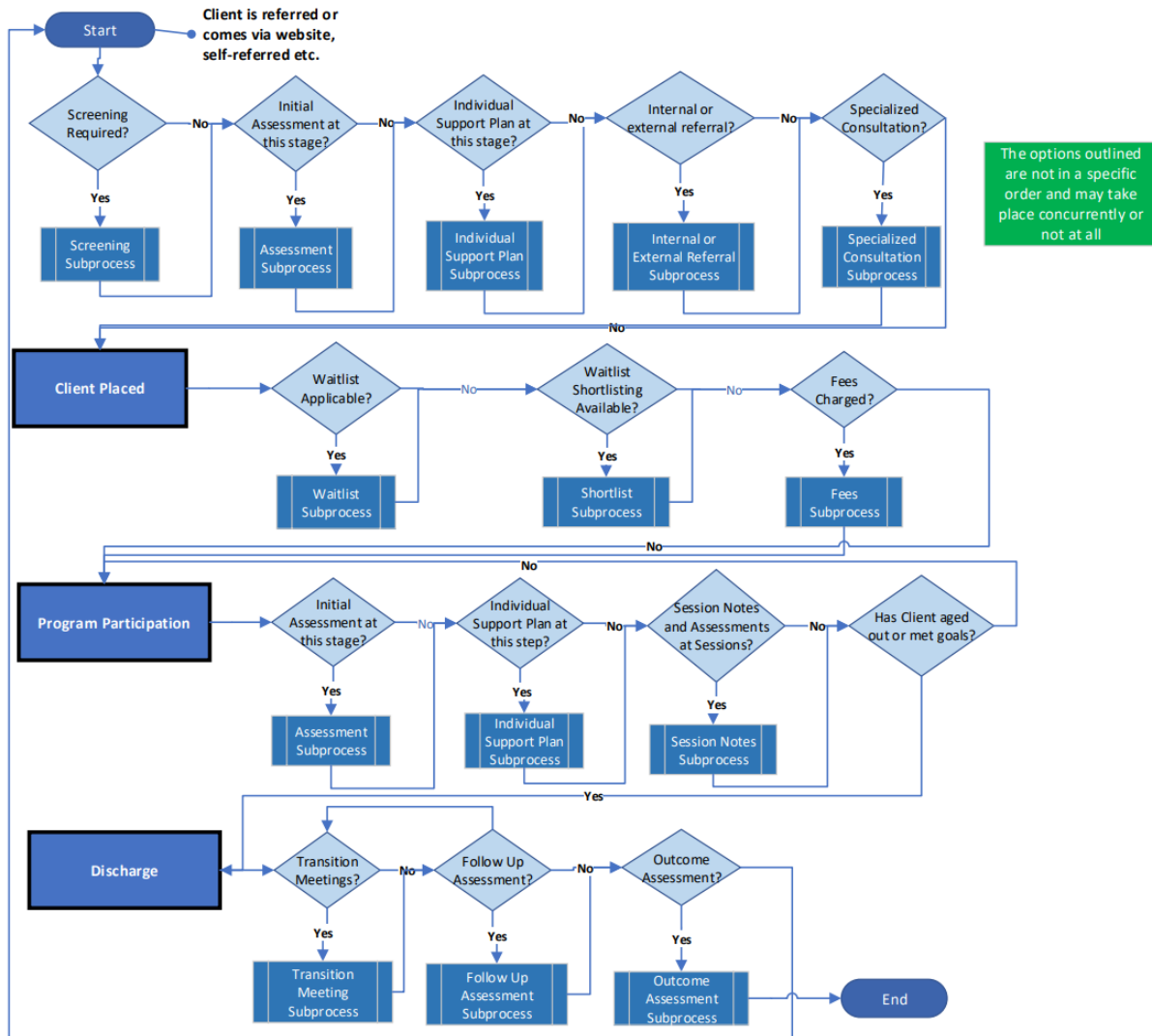


Figure 2: Detailed Current Business Process



### 3.3 Reporting Requirements

Lumenus currently retrieves the data for reporting from all our identified systems, and includes, but is not limited to, the following information: client demographics, service utilization, client satisfaction, caseload management, client volumes, wait times and duration, eligibility, and outcome assessment, etc. We produce reports to the Ministry of Health (MOH), Ministry of Children, Community and Social Services (MCCSS), City of Toronto, Public Health Agency of Canada, Lumenus Board of Directors, the Lead Agency (Strides Toronto) as well as the partner agencies, internal leadership and other funders.

Reports are delivered as necessary, on a predefined frequency or ad hoc basis. Please see “Supporting Document F – Lumenus Reporting Requirements, Main Variables and Indicators” which provides additional details on the reports required for Lumenus.

## 4. Evaluation Process and Criteria

All proposals are required to contain the following attachments and original documents in accordance with the instructions provided in the forms and outlined below:

1. Proposal Submission Form (Supporting Document A)
2. Mandatory Requirements (Supporting Document B)
3. Integration and Interface Requirements (Supporting Document C)
4. CIS Functional and Non-Functional Requirements (Supporting Document D)
5. Proponent References (Supporting Document E)
6. Proponent Overview (created by Proponent)
7. Project Management, Implementation, and Training Plan (created by Proponent)
8. Pricing Strategy (created by Proponent)

Proponent Proposals will be evaluated in the following three (3) stages:

| Evaluation Stage  | Evaluation Requirements                               | Score            |
|---|---|------------------|
| <b>Stage 1: Initial Requirements</b><br>Rating: Pass or Fail  | Supporting Document A – Proposal Submission Form      | <b>Pass/Fail</b> |
|   | Supporting Document B – Mandatory Requirements        |                  |
|   | Proponent Overview                                    |                  |
| All Proponents who pass Stage 1: Initial Requirements will advance to Stage 2: Engagement Requirements. |   |                  |
| <b>Stage 2: Engagement Requirements</b>   | Project Management, Implementation, and Training Plan | <b>20 points</b> |



| <b>Evaluation Stage</b>   | <b>Evaluation Requirements</b>   | <b>Score</b>     |
|---|--|------------------|
| Total Obtainable Points: 60   | Supporting Document C – Integration and Interface Requirements         | <b>15 points</b> |
|   | Supporting Document D – CIS Functional and Non-Functional Requirements | <b>25 points</b> |
| <b>Shortlisted Proponents from Stage 2: Engagement Requirements will proceed to Stage 3: Final Requirements</b> |  |                  |
| <b>Stage 3: Final Requirements</b><br>Total Obtainable Points: 40   | Proponent Presentations  | <b>10 points</b> |
|   | Supporting Document E - Proponent References                           | <b>10 points</b> |
|   | Pricing Strategy   | <b>20 points</b> |

#### 4.1 Stage 1: Initial Requirements

##### **Rating: Pass/Fail**

Each submitted Proposal will be thoroughly reviewed and evaluated to determine whether it meets the requirements as outlined in “Supporting Document A – Proposal Submission Form”, “Supporting Document B – Mandatory Requirements”, and the Proponent Overview. Any Proposal that does not meet or comply with all the criteria described in “Supporting Document A – Proposal Submission Form”, “Supporting Document B – Mandatory Requirements”, and the Proponent Overview will be disqualified from the proceeding to Stage 2: Engagement Requirements of the Evaluation Process. All Proposals that meet the specifications of “Supporting Document A – Proposal Submission Form”, “Supporting Document B – Mandatory Requirements” and Proponent Overview will proceed to Stage 2: Engagement Requirements of the Evaluation Process.

##### 4.1.1 Supporting Document A – Proposal Submission Form

The following information should be provided in “Supporting Document A – Proposal Submission Form” to receive a ‘Pass’ rating:

A. Proponent Information including:

- Full Legal Name
- Any Other Relevant Name under which Proponent Carries on Business
- Street Address
- City, Province/State
- Postal Code/Zip Code
- Country
- Phone Number
- Email Address
- Company Website (if any)
- Proponent Contact Information
  - Full Legal Name and Title
  - Proponent Contact Phone Number
  - Proponent Contact Email

Agreement with Sections A through F by providing:

- Signature of Witness
- Signature of Proponent Representative
- Name of Proponent Representative
- Title of Proponent Representative
- Date

#### 4.1.2 Supporting Document B – Mandatory Requirements

The following information should be provided in “Supporting Document B – Mandatory Requirements” to receive a ‘Pass’ rating:

##### A. Submission Requirements

- Proposal must be submitted by April 7, 2023, 11:00pm EST.
- Proposal is completed in full of the following documentation:
  - Proposal Submission Form (Supporting Document A)
  - Mandatory Requirements (Supporting Document B)
  - Integration and Interface Requirements (Supporting Document C)

- CIS Functional and Non-Functional Requirements (Supporting Document D)
- Proponent Overview (created by Proponent)
- Project Management, Implementation, and Training Plan (created by Proponent)
- Pricing Strategy (created by Proponent)
- Proponent References (Supporting Document E)

## B. Mandatory Requirements

In “Supporting Document B - Mandatory Requirements”, please provide the following responses, as appropriate, to receive a ‘Pass’ rating:

- Responses to questions 1, 4, 5, and 6 should be ‘Yes’.
- Responses to question 2 should be ‘Yes’ and include the names of three (3) Community Based Service Organizations within Canada, the Proposed Solution is installed in.
- Responses to question 3 should be ‘Yes’ and include the names of two (2) Community Service Organizations in Ontario, the Proposed Solution is installed in one of which has had the Proposed Solution installed and in-service for at least five (5) years.

### 4.1.3 Proponent Overview

The Proponent Overview should be created by the Proponent. Each proposal should include the following Proponent Overview Criteria to receive a ‘Pass’ rating:

- Background of the firm, company or partnership presenting the proposal, with all ownership structure, and financial viability.
- Description of security and privacy features of proposed solution including data and security policies and procedures, cybersecurity and compliance program certifications, applicable audit reports, jurisdictions of any employees or sub-contractors which may have system access, and a history of breaches.

- Experience in achieving the scope of services, as outlined above, from past projects.
- Summary of current market share in community health and/or mental health organizations in Ontario and/or Canadian, and/or American marketplace
- Details of who will be directly involved in this project and their experience including the resources of a project manager, technical lead, an interface and reporting developers and any other additional resources.

## 4.2 Stage 2: Engagement Requirements

### **Score: Maximum 60 obtainable points**

Stage 2: Engagement Requirements will include an evaluation of “Supporting Documents C – Integration and Interface Requirements” and “Supporting Document D – CIS Functional and Non-Functional Requirements” and an Implementation, Project Management, and Training Plan created by the Proponent. The Shortlisted Proponents will move forward to Stage 3: Final Requirements in the Evaluation Process. Scores from this round for the three (3) highest scoring Proponents will be cumulative and combined with the final score achieved in Stage 3: Final Requirements.

The requirements for Stage 2: Engagement Requirements are expected to include the following information through the Supporting Documents provided and an original, customized document created by the Proponent.

### 4.2.1 Project Management, Implementation, and Training Plan

As outlined in the 2.2 Scope of Services, a CIS solution is the desired product with support from the Proponent’s thorough project management approach, implementation plan, and training plan to equip all employees at Lumenus. Proponents are requested to provide a detailed explanation of how the new CIS will be implemented into Lumenus considering the Section 3. Current Infrastructure and Details which includes our current business processes and reporting requirements, also outlined in “Supporting Document F – Lumenus Reporting Requirements, Main Variables, and Indicators”. The system implementation must align with Lumenus’s future state processes, and the Proponent will work collaboratively with Lumenus to ensure the implementation meets requirements. It

is expected that projected timelines and milestones, change management approach, resource suggestions, and a detailed ongoing support model will be included in this plan. This Implementation, Project Management, and Training plan is worth 20 points and should be created by the Proponent and include the following details and should be no longer than 15 pages.

#### *4.2.1.1 Project Management (6 points)*

This description must address the following:

- A proposed project management approach and schedule including phases with descriptions including key activities, deliverables, and resource involvement leading to “Go Live”.
- Detailed description of how the Proponent will collaborate with Lumenus to understand current workflows and support in the development and revision of future state workflows in the CIS.
- Proposed Proponent’s Project Management resources, roles, and responsibilities.
- Change Management approach.
- Risk management

#### *4.2.1.2 Implementation (8 points)*

This description clearly defined assumptions and requirements from Lumenus for fulfilling the proposed timelines. This description should also address how the key activities and deliverables within the Project Management approach and schedule will be completed based on the information provided in Section 3. Current Infrastructure and Details. The Implementation will be evaluated based on:

- How well the proposed approach addresses Section 2.2 Scope of Services.
- How well the resources assigned to the project have the capacity to achieve Section 2.2 Scope of Services and the schedule outlined within the Project Management approach.
- How well the Proponent demonstrates a clear understanding of the “Supporting Document C – Integration and Interface Requirements” and “Supporting Document D – CIS Functional and Non-Functional Requirements”.

#### 4.2.1.3 Training (6 points)

This description must include in detail the following:

- How and when to onboard around 500 users and newly hired employees to the new CIS
- A staged approach to training including but not limited to training the trainers.
- Available offline training resources for staff
- Accessibility of training

#### 4.2.2 Supporting Document C – Integration and Interface Requirements

The submission of “Supporting Document C - Integration and Interface Requirements” should clearly state what integration and interface requirements are achievable, detailed explanations, and alternative solutions should be explained if specific requirements are not able to be met by the Proponent’s CIS product. Please respond in Column E using the drop-down function and add any relevant comments to Column F. The Integration and Interface requirements are worth a total of 15 points, eight (8) points for integration and seven (7) points for interface requirements.

#### 4.2.3 Supporting Document D – CIS Functional and Non-Functional Requirements

The final supporting document, “Supporting Document D – CIS Functional and Non-Functional Requirements”, for Stage 2: Engagement Requirements is expected to be completed in full by the Proponents. Proponents are required to rank their proposed CIS solution for each CIS Functional and Non-Functional Requirement in Column G using the drop-down menu. If a requirement cannot be met, this should be clearly stated, and an explanation should be provided in Column H of why the requirement cannot be met and/or what alternative solution the Proponent suggests for that specific requirement. The CIS Functional and Non-Functional Requirements are worth 25 points.

If customization of the solution is necessary to satisfy a requirement this should be clearly identified, and the response should include two (2) explanations of:

- Why the requirement cannot be met without customization, and
- How it will be met through customization

'Must Have' which are mandatory requirements will rank higher than 'Would Like' which are preferred requirements.

### 4.3 Stage 3: Final Requirements

The Shortlisted Proponents will advance to Stage 3: Final Requirements of the Evaluation Process. The Shortlisted Proponents will be notified of their proposal status by the Procurement Officer, Laurence Liu ([ylaurence@lumenus.ca](mailto:ylaurence@lumenus.ca)), on May 1, 2023, and will be provided with the case scenarios to select and present on.

#### 4.3.1 Proponent Presentations

**“Shortlisted Proponents”** will be required to give a 2 hour presentation to the Evaluation Committee and select Lumenus observers. Presentation dates and times will be scheduled with the Shortlisted Proponents. Stage 2: Engagement Requirements or Stage 3: Final Requirements scores may be lowered by the applicable evaluators at their discretion.

Presentations will include:

- Case scenario solution: Proponents will receive two (2) case scenarios of which they will need to select one (1) to address in their presentation, specifically explaining how their proposed CIS product will produce a recommended solution or workflow to the specified case scenario.
- Demonstration of proposed solution: This will include a live, real-time “walk through” of the CIS product and a question-and-answer session where the Lumenus Evaluation Committee will ask the Proponent questions about the proposed solution. Lumenus will specify in each Proponent presentation which functional and/or non-functional requirements should be included in the Proponent demonstrations.

#### 4.3.2 Supporting Document E – Proponent References

Please complete Supporting Document E- Proponent References form in full including three (3) contactable references from past projects of a similar nature and scope. References should include organizations or customers like Lumenus where they provide community based, mental health, developmental, and/or autism services and the

Proponent installed and serviced a CIS solution. Proponent References are worth 10 points. The Proponent's references will be evaluated upon some or all the following criteria:

- Ability to meet expectations of referenced organization and their requirements.
- Ability to stay within the budget or timeline.
- Ability to problem solve when issues arise.
- Relationship to Proponent
- Ability to provide support services during implementation.
- Experience on similar projects in similar community health organizations

#### 4.3.3 Pricing Strategy

The Pricing Strategy will be a separate document created by the Proponent and sent directly to the Lumenus Procurement Officer, Laurence Liu ([ylaurence@lumenus.ca](mailto:ylaurence@lumenus.ca)), by the Closing Time, which will be evaluated separately by the Procurement Officer. The Pricing Strategy is worth 20 points. The Evaluation Committee will not be privy to the Pricing Strategy during the evaluation process. The Pricing Strategy should reflect the first five (5) years for licensing, maintenance, and support in time and materials with a fixed capacity inclusive of any of the following that is applicable:

- One-Time Capital Cost and Annual Maintenance and/or Service Costs should be broken down and defined separately for Application/Functionality including (6 points):
  - Core System Design, Implementation, and Documentation
  - Client Portal (if separate)
  - Hardware and Third-Party Software Purchases (if applicable)
  - Licensing
  - Hosting
- One-Time Capital Cost and Annual Maintenance and/or Service Costs for Customization
- Annual Maintenance and/or Service Costs for Integration/Interface



- Cost for User Access including Standard User Licenses and Web Access Licenses for 500+ users.
- Cost of Implementation and Project Management Services:
  - Project Management
  - Resources of a project manager, technical lead, an interface and reporting developers and any other additional resources
  - Education/Training
  - Knowledge Transfer
  - Implementation Support
  - Reports Development
  - Travel (if applicable)
  - Database Configuration
  - Data Migration
  - Server Configuration
  - Product/Application Configuration/ Set up.
  - Build and support system integration and interfacing as per requirements listed in “Supporting Document C: Integration and Interface Requirements”
  - Consulting throughout Implementation

#### 4.4 Stage 4: Awarding the Contract

All Proponents can expect to be notified via email of the result of the RFP process by June 9, 2023. A “**Preferred Proponent**” is the highest scoring Proponent selected by the Lumenus Evaluation Committee at the end of the Evaluation Process. If Lumenus selects a Preferred Proponent, Lumenus will issue a written notice to such Proponent stating that it is the Preferred Proponent. Lumenus may enter negotiations with the Preferred Proponent. If Lumenus selects a Preferred Proponent, then such Preferred Proponent will use good faith commercial efforts to negotiate and enter a Contract with Lumenus. During negotiations Lumenus may:

- (a) negotiate any aspect of a Preferred Proponent's Proposal, including reductions in the prices as set out in the Preferred Proponent's Proposal.
- (b) negotiate the incorporation of the Preferred Proponent's suggested amendments to the Contract as may be included in its Proposal.
- (c) negotiate terms and conditions different than those contained in the RFP Documents, the Proposal or both; and
- (d) if at any time Lumenus reasonably forms the opinion that a mutually acceptable Contract is not likely to be reached within a reasonable time, give the Preferred Proponent written notice to terminate discussions, in which event Lumenus may then either open discussions with another Proponent or terminate this RFP in whole or in part and obtain the services in some other manner, or not at all.

Once a Preferred Proponent is selected and notified, Lumenus will proceed with initial discussions with the Preferred Proponent regarding the Terms and Conditions for this project.

Please note that:

- Proposals that do not meet the evaluation criteria will be disqualified (Proponent will be informed why the Proposal was insufficient)
- To be fair to all Proponents, late submissions and phone calls or emails to discuss Proposal status after Proposal will not be accepted.
- Only short-listed Proponents will be contacted for a presentation.

## 5. Terms and Conditions

### 5.1 Delivery of Response to Request for Proposals

Please send electronic copy via email to Lumenus Procurement Officer, Laurence Liu, by the "**Closing Time**", April 7, 2023, by 11:00pm EST.

Lumenus does not assume any risk or responsibility or liability, including in contract or tort (including negligence), whatsoever to any person that an electronic transmission or

communication is received by Lumenus in its entirety or within any time limit specified by this RFP.

Delivered Proposals may be amended in writing, provided such written amendment is received by Lumenus prior to, but not after, the Closing Time. Oral amendments will not be considered or accepted.

## 5.2 Proposal Time Limit

Each bidding organization shall commit that the proposal is valid and accurate for 120 days from the Closing Time.

## 5.3 Selection Process

Lumenus will review all applications but reserves the right to accept or reject any proposals. The award of an organization will be based on a review of proposals against all evaluation criteria and will not necessarily be awarded based on the lowest price offered but rather the overall assessment of value for money.

Each applicant will be provided with fair access to information, as requested by email (see Section 6. Key Dates and Contact Information). Additional written materials, to ascertain the qualification or suitability of an applicant may be requested.

## 5.4 Procurement Officer

The following person is the “**Procurement Officer**” for this RFP:

Name: Laurence Lui

Title: Manager, Financial Planning and Analysis

Email: *ylaurence@lumenus.ca*

## 5.5 Enquiries and Responses

All enquiries regarding this RFP must be directed, through MERX.com, to the Procurement Officer and the following will apply to any enquiry:

(a) Lumenus reserves the right to decline to provide a response to an enquiry, considering fairness to all Proponents and the integrity of this competitive procurement process;

(b) subject to paragraph 5.3, any reply from the Procurement Officer to an enquiry will be distributed to all through MERX.com as either a question and answer as part of a question-and-answer series for this RFP (“**Q&As**”).

(c) a Proponent may request that an enquiry and the response be kept confidential if the Proponent considers the enquiry is commercially confidential to it; if Lumenus determines that an enquiry or the response or both must be distributed to all Proponents, then the Procurement Officer will permit the enquirer to withdraw the enquiry rather than receive a response; and

(d) subject to paragraph 5.1, and notwithstanding paragraph 5.3, any enquiry and its response may, in Lumenus’s sole and absolute discretion, be distributed to all Proponents, or the Procurement Officer may keep either or both the enquiry and response confidential if, in the judgment of Lumenus, it is fair and appropriate to do so.

Information obtained from any source other than the Procurement Officer will not form part of this RFP and may not be used or relied on by a Proponent for the purpose of preparing its Proposal.

In preparing a response to any enquiry, the Procurement Officer may consult with other persons, including other Lumenus employees or Lumenus consultants and advisors.

## 5.6 Alternatives

The RFP documents include specifications for the performance of the services and may include drawings for the design of the Services. Proponents may provide Proposals based on such specifications and drawings or may, in addition to, or in substitution for any element of the specifications or design or both as described in the RFP Documents, propose specification or design alterations, modifications or amendments. A Proponent should clearly identify in its Proposal any proposed specification or design alteration, modification, or amendment, including the rationale and the benefit to Lumenus (such as the amount of cost-savings or superior performance), if any, for each alteration, modification, or amendment. A Proponent will be deemed to fully accept and to agree to fully comply with the specifications and design as described in the RFP Documents, except as may be expressly described otherwise in the Proposal.

## 5.7 Conflict of Interest

Applicants responding to the RFP must not have any personal or business interests that would present an actual, potential, or apparent conflict of interest with the performance of the contract to be awarded. Should the potential perception of a conflict of interest exist, this must be explicitly declared in writing as soon as knowledge of such a conflict may arise. Each Proponent is required to provide the statement contained in the Proposal Submission Form (Appendix A) as it relates to conflict of interest.

## 5.8 Distribution of the Invitation for Proposals

This invitation has been released by:

- Publication on Lumenus's website and social media sites
- Publication on MERX.COM

## 5.9 Reservation of Rights

Lumenus reserves the right, in its sole and absolute discretion, to:

- a. at any time, for any reason, reject any or all Proposals and terminate the process under this RFP, and proceed with the services as described in this RFP in some other manner, including reissue a request for proposals or undertake another procurement process for the same or similar scope of services.
- b. evaluate a Proposal that includes one or more alteration, modification or amendment to the scope of work as permitted by Section 5.6 (whether such alteration, modification or amendment is in addition to, or in substitution for any element of the specifications or design or both) by applying the evaluation criteria as set out in Section 4. to identify the alteration, modification or amendment that Lumenus determines is most advantageous to itself, and select that Proposal based on the identified alteration(s), modification(s) or amendment(s) together with the corresponding adjustment, if any, to the Proposal Price;
- c. accept the Proposal which, applying the evaluation criteria as set out in Section 4. Lumenus determines is most advantageous to itself, and, without limitation, select a Proposal which does not have the lowest Proposal Price;

d. award separate contracts for portions of the services, including with respect to one or more payment items; and

e. if only one Proposal is received, reject that Proposal, and terminate the process under this RFP, and proceed with the services as described in this RFP in some other manner, including entering negotiations with that Proponent with respect to any matter, including price.

### 5.10 RFP Dispute Resolution Process and Procedures

Unsuccessful Proponents may request a debriefing within 60 calendar days following the date of the contract award notification. The request should be submitted to the Procurement Officer. The Procurement Officer will respond to the Proponent and arrange an applicant debriefing within 10 business days of receiving the request.

When conducting Proponent debriefings, Lumenus will:

- Confirm with each applicant the date, time, and location of the debriefing session in writing.
- Conduct separate debriefings with each applicant, where requested.
- Not disclose information concerning other applicants, other than the names and address of the Proponents who participated in the RFP.
- Not answer questions unrelated to the RFP
- Provide a general overview of the evaluation process set out in the procurement documents.
- Discuss strengths and weaknesses of the applicant's submission in relation to specific evaluation criteria.
- Provide suggestions on how the applicant may improve future submissions.
- Address questions and issues raised by the applicant in relation to their Proposals.

After the debriefing process, if a Proponent wishes to dispute the outcome of the RFP process, the aggrieved party is to file the bid protest in writing to the CEO, by registered mail or email within 10 business days of the debriefing meeting. A protest in writing shall include:

- The name and address of the complainant
- Identification of the RFP process being protested.
- The date of the debriefing and the name of the procurement officer who conducted the debriefing.
- Detailed and factual statements of grounds for protest
- The complainant's arguments and supporting documentation and
- The complainant's requested remedy

The CEO will respond, in writing, to the complainant within 10 business days of receipt of the protest. The final decision on the issue will come from the CEO, in consultation with appropriate Lumenus senior management and Board of Directors involvement and shall be considered final and conclusive.

### 5.11 Information Disclosure

Any confidential information supplied to Lumenus may be disclosed by Lumenus where it is obliged to do so under the Freedom of Information and Protection of Privacy Act (FIPPA), by order of a court or tribunal or otherwise required by law.

Additional Terms and Conditions will be mutually agreed upon by Lumenus and the Preferred Proponent upon notification during the finalization of the contract.

### 5.12 Cost of Preparing a Proposal

Each Proponent is solely responsible for its own costs and expenses incurred in preparing and submitting its Proposal and for participating in this competitive procurement process, including for any meetings, due diligence, negotiations, or discussions with Lumenus or Lumenus's representatives and consultants, relating to or arising from this RFP.

### 5.13 No Claims

Each Proponent, by submitting a Proposal, irrevocably:

- a. agrees that it will not bring any claim, demand, action, cause of action, suit or proceeding, whether arising in contract, tort (including negligence) or otherwise (a "**Claim**") against Lumenus or any of its employees, directors, officers, advisors or representatives, or any one of them, for any costs, damages or other compensation in excess of an amount equivalent to the

actual and reasonable costs directly and demonstrably incurred by the Proponent in preparing its Proposal for any matter relating directly or indirectly to this RFP (including in the event that Lumenus rejects or disqualifies or for any other reason fails to accept a Proposal, accepts a non-compliant Proposal or otherwise breaches, or fundamentally breaches, the terms of this RFP or any duties arising from this RFP); and

- b. waives any Claim against Lumenus and its employees, directors, officers, advisors or representatives for any compensation of whatsoever nature or kind, including for loss of anticipated profits, loss of opportunity, indirect, incidental or consequential damages or losses if no contract is entered into for the Services between the Proponent and Lumenus for any reason whatsoever, including in the event that Lumenus rejects or disqualifies or for any other reason fails to accept a Proposal, accepts a non-compliant Proposal or otherwise breaches, or fundamentally breaches, the terms of this RFP or any duties arising from this RFP.

#### 5.14 No Representation or Warranty

Each Proponent will investigate and satisfy itself of every condition that affects the preparation of its Proposal. Each Proponent acknowledges and represents that its investigations have been based on its own examination, knowledge, information, and judgment, and not upon any statement, representation or information made or given by Lumenus, the Procurement Officer or any advisor to Lumenus, other than the information contained in this RFP. Submission of a Proposal is deemed to be conclusive evidence that the Proponent accepts the terms of this Section 5. Lumenus accepts no responsibility for any Proponent lacking any information.

#### 5.15 No Collusion or Solicitation

By submitting a Proposal, the Proponent, for and on behalf of the Proponent and the Proponent's team, represents and confirms to Lumenus that the Proponent has prepared its Proposal without any connection, knowledge, comparison of figures, arrangement or collusion with any other person or persons submitting or participating in the preparation of a Proposal.



Each Proponent may not make any representations, solicitations, or other communications to any elected or appointed official, director, officer, or employee of Lumenus or to a member of the Evaluation Committee with respect to its Proposal, either before or after submission of its Proposal, except as expressly provided in this RFP. If any representative of a Proponent communicates improperly contrary to this paragraph, then Lumenus may, in its sole and absolute discretion, regardless of the nature of the communication, reject the Proposal submitted by the Proponent.

## 6. Key Dates and Contact Information

| Procurement Timetable   |                       |            |
|---|-----------------------|------------|
| Item  | Date                  | Time (EST) |
| Lumenus RFP Issue Date  | February 22, 2023     | 5:00pm     |
| Clarification Requests and Questions Deadline                                   | March 1, 2023         | 5:00pm     |
| Lumenus's Deadline to provide responses to Clarification Requests and Questions | March 10, 2023        | 5:00pm     |
| Intent to Bid Deadline (through a confirmation email to Procurement Officer)    | March 17, 2023        | 5:00pm     |
| Electronic Proposal Submission Deadline (the " <b>Closing Time</b> ")           | April 7, 2023         | 11:00pm    |
| Shortlisted Proponents notified of request for presentation                     | May 1, 2023           | 5:00pm     |
| Shortlisted Proponent presentation period                                       | May 15 - May 23, 2023 | 5:00pm     |
| Notification of Selected Proponent and Commencement of Contract Finalization    | June 9, 2023          | 5:00pm     |
| Estimated Lumenus CIS Implementation Project Start Date                         | July 17, 2023         | 5:00pm     |



**Please submit intent to bid and electronic proposals to:**

**Laurence Liu**  
**Manager, Financial Planning and Analysis**  
**Lumenus Community Services**  
**1126 Finch Ave West, Unit 16**  
**Toronto ON M3J 3J6**  
[\*ylaurence@lumenus.ca\*](mailto:ylaurence@lumenus.ca)

Lumenus reserves the right, at its sole discretion, at any time prior to the Closing Time, to amend any of the foregoing dates/times, per the Terms and Conditions described in this RFP.

All time stated in this RFP are in reference to the local Eastern Standard Time. Please remain aware that Toronto observes Daylight Savings Time within a year.

## 7. Appendices

### Appendix “A” – Proposal Submission Form

*Rating: Pass or Fail*

The Proposal Submission Form is a document to inform Lumenus of the Proponent’s information and necessary submission criteria.

#### **A. Proponent Information**

Please fill out the form, naming one contact person of the Proponent:

| Proponent Information  |  |
|--|--|
| Full Legal Name:   |  |
| Any Other Relevant Name under which Proponent Carries on Business: |  |
| Street Address:  |  |
| City, Province/State:  |  |

|                                      |  |
|--------------------------------------|--|
| Postal Code/Zip Code:                |  |
| Country:                             |  |
| Phone Number:                        |  |
| Email Address:                       |  |
| Company Website (if any):            |  |
| <b>Proponent Contact Information</b> |  |
| Full Legal Name and Title:           |  |
| Proponent Contact Phone Number:      |  |
| Proponent Contact Email:             |  |

**B. Ability to Provide Deliverables**

The Proponent has a clear and thorough knowledge of the required Deliverables as described in this RFP. The Proponent represents and guarantees its ability to provide the Deliverables in accordance with the requirements of the RFP.

**C. No Prohibited Conduct**

The Proponent declares that it has not participated in any conduct prohibited by this RFP.

**D. Pricing**

In accordance with the instructions stated in the RFP, the Proponent confirms the pricing information provided is accurate.

**E. Conflict of Interest**

For this RFP, the term “Conflict of Interest” means any prior, existing, or reasonably foreseeable circumstance involving the Proponent (which for the purposes of the entirety of this definition includes any individual reasonably connected to the Proponent), that has the potential to compromise or bias the Proponent’s professional judgement, objectivity, impartiality, or public/fiduciary duties, and includes an Apparent Conflict of Interest. An “Apparent Conflict of Interest” exists where a reasonable person having knowledge of any prior, existing, or reasonably foreseeable circumstances affecting the Proponent is likely

to perceive that those circumstances are to compromise or cause bias to the Proponent's professional judgement. In its sole discretion, the final determination of whether a Conflict of Interest exists shall be made by Lumenus.

If the box below is left blank, the Proponent will be deemed to declare that:

- (i) no Conflict of Interest exists in relation to Proponent's Proposal
- (ii) there is no foreseeable Conflict of Interest in performing the contractual obligations contemplated in the RFP

Otherwise, if the statement below applies, check the box.

The Proponent declares that there is an actual or potential Conflict of Interest relating to the preparation of its Proposal, and/or the Proponent foresees an actual or potential Conflict of Interest in performing the contractual obligations contemplated in the RFP.

If the Proponent declares an actual or potential Conflict of Interest by marking the box above, the Proponent must set out details of the actual or potential Conflict of Interest in detail as an additional section in this submission form.

---

Conflict of Interest:

#### F. Disclosure of Information

The Proponent hereby agrees that any information provided in this Proposal, even if it is identified as being supplied in confidence, may be disclosed (a) where required by law or by order of a court or tribunal; and (b) by Lumenus, on a confidential basis, to the advisors retained by Lumenus to advise or assist with the RFP process, including with respect to the evaluation this Proposal.

\_\_\_\_\_  
Signature of Witness

\_\_\_\_\_  
Signature of Proponent Representative  
\*I have the authority to bind the Proponent

\_\_\_\_\_  
Name of Witness

\_\_\_\_\_  
Name of Proponent Representative

\_\_\_\_\_  
Title of Proponent Representative

\_\_\_\_\_  
Date

### Appendix “B” – Mandatory Requirements

*Rating: Pass or Fail*

| Mandatory Requirements  | Proponent Response   |
|---|--|
| <p>1. Is the Proponent’s Proposed Solution compliant with Personal Health Information Protection Act (PHIPA), Accessibility for Ontarians with Disabilities Act (AODA), and Personal Information Protection and Electronic Documents Act (PIPEDA)?</p>                              | <p><input type="checkbox"/> Yes      <input type="checkbox"/> No</p>   |
| <p>2. Is the Proposed Solution installed and in-service in at least three (3) Community Based Service Organizations within Canada?</p> <p>If ‘Yes’, please identify which three (3) Community Based Service Organizations within Canada, the Proposed Solution is installed in.</p> | <p><input type="checkbox"/> Yes      <input type="checkbox"/> No</p> <p>List the names of three (3) Community Based Services Organizations within Canada, the Proposed Solution is installed in:</p> <p>1.</p> <p>2.</p> <p>3.</p> |

|   |  |
|---|--|
|   |  |
| <p>3. Is the Proposed Solution installed and in-service in at least two (2) Community Based Service Organizations in Ontario, one of which it has been installed and in-service for at least five (5) years?</p> <p>If 'Yes', please identify which two (2) Community Based Service Organizations in Ontario, the Proposed Solution is installed and in-service. Provide at least one (1) Community Based Service Organization in Ontario that has been installed and in-service for at least five (5) years.</p> | <p><input type="checkbox"/> Yes      <input type="checkbox"/> No</p> <p>List the names of two (2) Community Service Organizations in Ontario, the Proposed Solution is installed in:</p> <p>1.</p> <p>2.</p> |
| <p>4. Does the Proposed Solution store all health information in Canada?</p>  | <p><input type="checkbox"/> Yes      <input type="checkbox"/> No</p>   |
| <p>5. Does the Proposed Solution include an Integrated Data Repository that can accept feeds from external/third-party solutions?</p>   | <p><input type="checkbox"/> Yes      <input type="checkbox"/> No</p>   |
| <p>6. Does the Proposed Solution can Support Ministry Reporting Requirements and Data Elements for</p>  | <p><input type="checkbox"/> Yes      <input type="checkbox"/> No</p>   |

|  |  |
|--|--|
| Children and Youth Mental Health<br>Business Intelligence (BI) Solution? |  |
|--|--|

### Appendix “C” - Integration and Interface Requirements

This document is an attached Excel spreadsheet outlining applications to be retained and interfaced with the new CIS solution. Score includes 15 obtainable points.

### Appendix “D” – CIS Functional and Non-Functional Requirements

This document is an attached Excel spreadsheet outlining the requirements for Lumenus CIS solution. Score includes 25 obtainable points.

### Appendix “E” - Proponent References

This document is an attached Excel spreadsheet requesting at least three (3) references from the Proponent. Score includes 10 obtainable points.

### Appendix “F” – Lumenus Reporting Requirements, Main Variables, and Indicators

This document is an attached Excel spreadsheet listing all Lumenus’s current reporting requirements including those produced internally for internal leadership, Funders, Ministries, and partners.