

CALL FOR QUOTATION: RESIDENT IEQ STUDY RECRUITMENT AND SURVEY ADMINISTRATION

Purpose

The Atmospheric Fund (TAF) is seeking a survey firm to undertake a resident survey and study recruitment at two Toronto housing complexes. The RFQ proponent should suggest the best course of action (telephone survey, online survey, etc. or a combination of approaches).

Background Information

The Atmospheric Fund (TAF) is undertaking indoor environmental quality (IEQ) monitoring programs at two social housing sites (a 4-storey apartment building located at Bathurst and Eglinton in Toronto, and a walk-up apartment complex located at Leslie and Finch in Toronto), which will undergo extensive energy retrofits in 2021/2022. This program involves two key components: the administration of occupant surveys before and after energy retrofit work has been completed on the buildings, and the installation of monitoring equipment in suites.

In general, residents have some awareness of the overall energy efficiency projects which TAF is carrying out on site. The social housing provider for the site is a partner on the project, and site staff will be made aware of the survey work at project start.

TAF will:

- Deliver written informational notices of the study to residents prior to work
- Provide a digital copy of the prepared survey and survey script
- Provide a digital copy of notices about the survey for the Successful Proponent to distribute
- Provide a digital copy of the Informed Consent form to be completed by every participant
- Provide compensation to be given to participants for completion of survey in the form of gift cards
- Provide a list of all the units to be included in the study

As discussed in the Scope of Work below, the Successful Proponent will be responsible for:

- Proposing the methodology for occupant survey administration, not limited to phone, online, or in person
- Administering the survey
- Collecting completed informed consent forms
- Delivering notices about the survey and scheduling return visits for any residents who are unavailable at the time, as needed, within the allotted time frame
- Providing the collected survey data in the format agreed upon by TAF

The Successful Proponent will **not** be expected to:

- Create the survey questions or informed consent forms
- Analyse any of the collected data
- Install IEQ monitoring devices or other equipment

Scope of Work and Associated Deliverables

The following tasks should be carried out for the identified sites. TAF may substitute or remove the below sites at their discretion, understanding that the per response price provided by the Successful Proponent should remain the same and the location will be within the GTHA.

Administer pre-retrofit occupant surveys

Using the survey provided to the Successful Proponent by TAF, collect responses from each of the participating residents. Only one resident survey should be conducted per unit. The survey is five pages long and takes approximately 15-20 minutes to administer. Note that TAF does not require analysis of the survey data, only collection and presentation of the data in a digital format to be agreed upon with TAF.

All survey participants must complete an Informed Consent form, to be provided to the Successful Proponent by TAF. This Informed Consent Form will be broken down into two separate sections, requiring signature for each:

- a) Consent for survey participation (mandatory)
- b) Consent for participation in monitoring study (voluntary)

For the voluntary measures, TAF would like to receive Informed Consent from as many surveyed participants as possible, meeting at a minimum the targets specified below.

Table 1. Eligible participants and targets

Site	Total number of units	Target number of units for surveys	Target number of units for monitoring
Bathurst Eglinton Site	40	22-26	10+
Leslie Finch Site	175	95-112	44+
TOTAL	215	117-138	54+

Deliverables:

- 1) A proposed methodology for occupant survey administration and data collection to be submitted for approval by TAF and the building owners prior to administering surveys.
- 2) A completed Informed Consent form for each surveyed resident. Including signatures for the mandatory and voluntary sections as applicable.

- 3) A summary list of the surveyed residents from each building including a first name, phone number, the date and method by which they were recruited, if more than one method was used. Please indicate which sections of consent form have been signed.
- 4) All survey data, provided in a format agreed upon with TAF.

Additional Future Survey Work

TAF intends to administer post-retrofit resident surveys approximately one year after significant completion of retrofit measures at each of the sites. At this time, we are estimating post-retrofit surveys to take place between 2022 and 2023.

Provided that the Successful Proponent completes the pre-retrofit work in a satisfactory manner, and TAF wants the Successful Proponent to take on the post-retrofit work, TAF will, at its sole discretion, offer to enter into a contract with the Successful Proponent for the post-retrofit survey work, on terms and conditions substantially the same as the Contract for the pre-retrofit work. We see value in maintaining a consistent survey provider both pre-and-post retrofit.

Evaluation Process

TAF will conduct the evaluation of bids in the following two stages.

Stage 1: The bids will be reviewed to determine whether they comply with all of the mandatory requirements of the RFQ. Bids that are substantially incomplete or that do not substantially comply with the requirements to this RFQ will be excluded from consideration in stage 2.

Stage 2: The compliant bids will be ranked on the basis of the lowest submitted pricing of each bid in accordance with the pricing form.

RFQ Timetable

TAF's currently proposed schedule for each step in the RFQ process is set out below.

<i>Event</i>	<i>Scheduled Date</i>
RFQ issue date	July 16, 2021
Deadline for Questions	July 23, 2021
Addendum issued (if required)	July 27, 2021
Submission deadline	July 29, 2021
Anticipated award date	August 3, 2021

This schedule is subject to change and appropriate written notice of any changes will be provided where feasible. The Successful Proponent will be notified on Tuesday, August 3, 2021. The expected project start date is August 9th, 2021 and should be completed within 1-2 months.

Clarifications

As part of the evaluation process, the Selection Committee may make requests for further information with respect to the content of any Proposal in order to clarify its understanding of the Supplier's response. The clarification process shall not be used to obtain required information that was not



submitted at time of close or to promote a particular Supplier. The Selection Committee may request this further information from one or more Suppliers and not from others.

Negotiations and Agreement

The award of any Agreement will be at the absolute discretion of TAF. The selection of a recommended Supplier will not oblige TAF to negotiate or execute an Agreement with that recommended Supplier.

Any award of an Agreement resulting from this RFQ will be in accordance with the bylaws, policies and procedures of TAF.

TAF shall have the right to negotiate on such matter(s) as it chooses with the recommended Supplier without obligation to communicate, negotiate, or review similar modifications with other Suppliers. TAF shall incur no liability to any other Supplier as a result of such negotiation or alternative arrangements.

During negotiations, the scope of the services may be refined, issues may be prioritized, responsibilities among the Supplier, all staff and sub-consultants provided by it and TAF may be settled and the issues concerning implementation may be clarified.

Any Agreement must contain terms and conditions in the interests of TAF and be in a form satisfactory to TAF's Solicitor.

If any Agreement cannot be negotiated within thirty (30) to ninety (90) business days of notification to the recommended Supplier, TAF may, at its sole discretion, terminate negotiations with that Supplier and negotiate an Agreement with another Supplier or abort the RFQ process and not enter into any Agreement with any of the Suppliers.

Bid Submission Requirements

Bid Documentation and Delivery

Submit bids by July 29th, 2021 to purchasing@taf.ca with the subject line *IEQ Survey RFQ Bid Submission*

Bid Submission Form

The supplier shall complete and submit all information and respond to all items in the bid submission form set out in Appendix A.

Accessibility & Inclusion

We strive to build a team and supplier network that reflects the community we work in, and encourage bids from traditionally underrepresented groups such as women, visible minorities, Indigenous peoples, people identifying as LGBTQ2S*, people with disabilities, and others with the skills and knowledge to



productively engage with diverse communities. If we can make this request for proposals easier through any accommodations in the process, please let us know by emailing purchasing@taf.ca.

Confidentiality and Conflict of Interest Agreements

The successful Supplier will be required to sign a confidentiality agreement and Conflict of Interest Declaration.

APPENDIX A

BID FORM

RETURN BY: E-Mail – purchasing@taf.ca

REQUEST FOR QUOTATION FOR: RESIDENT IEQ STUDY RECRUITMENT AND SURVEY ADMINISTRATION

DESCRIPTION:

- Administering resident surveys
- Collecting completed informed consent forms
- Delivering notices and scheduling return visits with residents
- Providing the collected survey data in the format agreed upon by TAF

CLOSING DATE: July 25, 2021

CLOSING TIME: 5:00pm local time

DIVISIONAL: Kaitlin Carroll

PHONE NO.: 416-393-6384

ISSUED DATE: July 14, 2021

Company Name:				
Address:				
Contact Name/Title:				
Telephone Numbers:				
E-mail Address:				
Qty	Unit of Measure	Description	Unit Price	Extended Price
1	Report	Methodology for survey administration and data collection		
26	Survey response	Collection of occupant survey data		
112	Survey response	Collection of occupant survey data		
Invoice: To be sent to: The Atmospheric Fund 75 Elizabeth St. Toronto, ON M5G 1P4			Subtotal	\$ _____
			HST	\$ _____
NO BID Reason: _____			TOTAL	\$ _____

Where there is a discrepancy between the unit price and the extended price, the unit price shall prevail. Bidders are expected to acknowledge receipt of Addendum/Addenda as indicated below. Failure to do so shall result in the bid being declared non-compliant.

I/We the undersigned offer to supply the above at the price and conditions hereon offered:

Authorized Signature

THIS FORM SHALL BE COMPLETED, PROPERLY SIGNED AND RECEIVED ON OR BEFORE THE DATE AND TIME SPECIFIED, OR YOUR BID WILL BE DECLARED NON-COMPLIANT.