

Request for Proposals

For a Consultant to Assist with a Review of Psychologically Healthy and Safe Workplace Policies and Practices.

Executive Summary

Canadian Mental Health Association, Vancouver-Fraser Branch (CMHA-VF) is seeking proposals from consultants to assist with our review of our *Psychological Safe Workplace Policy*, our *Respectful Workplace Charter* (attached as Schedule A and B) and our practices related to a psychologically healthy and safe workplace. The Policy and Charter were originally written in 2012, just before the launch of the national standard *Psychological Health and Safety in the Workplace*. Minor adjustments have been made to the Policy since it was originally written, however, there have been significant developments in thinking and practice related to psychological health and safety in the work place and CMHA-VF would like to ensure our policies and practices are aligned with best practice and current thinking on the topic.

It is anticipated that the consultant will:

- Conduct a review of the organization's current practices and policies related to psychological health and safety in the workplace compared to current best practices.
- Provide education to the organization (all staff – union and management) to build a common understanding of the current thinking and best practices regarding psychologically healthy and safe workplaces;
- Support the organization to identify what existing practices should be maintained and what new practices related to a psychologically health and safe workplace can and will be implemented within the context of the respective collective agreements and available budget, and to identify priorities for new practices as additional dollars come available;
- Support the organization to review and, if necessary, re-write our *Respectful Workplace Charter*; and
- Support the organization to review and, if necessary, re-write our *Psychologically Safe Workplace Policy*.

Interested consultants are requested to submit their intention to submit and any questions related to the RFP by email by **3:00 pm on November 18, 2019** to the email address below. Their full electronic proposals in in Word or PDF format are due no later than **3:00 pm on December 2, 2019** at email address below according to the instructions contained in this RFP. If your proposal consists of multiple files, ensure you include a complete list of the files in your cover email.

Michael Anhorn, Executive Director
Canadian Mental Health Association, Vancouver-Fraser Branch
michael.anhorn@cmha.bc.ca

Organization

CMHA-VF is an independently incorporated and run not-for-profit organization registered with the Canada Revenue Agency as a charitable organization. We are a member of the Canadian Mental Health Association federation which consists of 85 independent organizations across Canada. CMHA-VF was founded in 2015 through the amalgamation of three formerly independent CMHA branches (Delta, Simon Fraser and Vancouver-Burnaby). Together, the founding branches have been providing services in Metro Vancouver for over 60 years. CMHA-VF provides services across Metro Vancouver except for the north shore, which has its own CMHA branch.

CMHA-VF believes everyone deserves to be mentally healthy and live in a healthy community. By offering community-based mental health education, services, and supports for all ages, CMHA, Vancouver-Fraser contributes to the long-term health and wellbeing of our communities. We have three pillars of work:

- **Wellness and Community Inclusion** – We walk alongside people living with mental illness. We support them to reach their hopes and dreams and to live full and contributing lives in their communities.
- **Prevention and Early Intervention** – We increase young peoples’ mental health knowledge while developing their skills to maintain positive mental health and to ask for help when they need it.
- **Mental Health Promotion** – Mental health includes habits and behaviours that build positive mental health, social support networks we can count on and having a strong connection to our community. We help people with these aspects of living a mentally healthy life and reduce the stigma related to mental illness.

CMHA-VF has a staff team of approximately 150 staff who work in 35 different locations across the lower mainland. We have staff in two unions: Hospital Employees Union (HEU), and British Columbia Government Employees Union (BCGEU). We also have non-union management staff. Our unionized staff are in one of two collective agreements: Health Services and Support – Community Subsector Association (both HEU and BCGEU employees), and The Health Science Professionals Bargaining Association (HEU employees). Our management staff have individual employment contracts that outline their employment relationship with CMHA-VF.

Since 2015, the Guarding Minds at Work Survey has been conducted every November to measure our alignment with the 13 factors outlined in the national standard as affecting psychological health and safety at work.

Background

In 2012, the staff of the Vancouver-Burnaby Branch worked with a consultant to co-author the *Respectful Workplace Charter* and the *Psychologically Safe Workplace Policy* (included as Schedule A and B respectfully). This process was initiated after a difficult period of time in the organization where a number of staff experienced bullying. The charter and policy were formally adopted by the organization just prior to the launch of the national standard on psychological safety in the workplace (*Psychological Health and Safety in the Workplace*), and while minor adjustments were made to the policy in response to the national standard, neither the policy nor the charter have gone through a significant review or updating since.

In 2015, CMHA-VF implemented the Guarding Minds at Work Survey in the hopes of gathering information on our alignment with the 13 factors outlined in the national standard. At the time, Guarding Minds at Work was the only validated measure of an organization's alignment with the 13 factors included in the national standard for psychological health and safety at work. CMHA-VF implemented Guarding Minds at Work with the hope that it would help us make evidence-informed decisions related to improving the psychological health and safety of all of our staff. A summary of the results of the Guarding Minds at Work Surveys is included in Schedule C and the full results will be made available to the successful proponent. Compared to the standardized national sample, our results are quite high.

There are a couple of reasons why we would like to do this review now including:

- high staff upset in reaction to a restructuring in the organization in 2018 and perceptions that our charter may not have been adhered to; and
- the results on a few of the Guarding Minds at Work factors decreasing significantly.

Process and Deliverables

Proponents are requested to clearly outline the processes you will use to produce the deliverables outlined later in this section. CMHA-VF's request is that the processes be as participatory as possible, and facilitate as much staff engagement throughout the organization as possible. It is anticipated that the process would start in January 2020.

In addition, in keeping with the values of CMHA, the process needs to be based on evidence-based best practices and should be designed to help CMHA-VF move towards being a leader in psychological health and safety in the workplace in our region.

At a minimum, the successful proponent will deliver the following to CMHA-VF:

- 1) One or more education sessions to the organization (all staff – including both union and management) designed to build a common understanding of the current thinking and best practices regarding psychologically healthy and safe workplaces.
- 2) A written review of the organization's current practices and policies related to psychological health and safety in the workplace compared to current best practices.
- 3) Written recommendations (as identified by the staff in the organization and based on best practices) regarding what existing practices should be maintained; what new practices related to a psychologically health and safe workplace can and will be implemented within the context of the respective collective agreements and available budget; and priorities for new practices as additional dollars come available.
- 4) If identified as necessary by the best practice review and staff session(s), a re-written *Respectful Workplace Charter*.
- 5) If identified as necessary by the best practice review and staff session(s), a re-written *Psychologically Safe Workplace Policy*.

Anticipated Budget

CMHA-VF has identified a maximum budget of approximately \$10,000 for this project .

No Conflict of Interest

Proponents must not be in a conflict of interest with CMHA, Vancouver-Fraser, the members of its Board of Directors or staff. Proponents' proposal must clearly disclose whether or not they have any real or perceived conflicts of interest.

Intent to Submit and Questions

Proponents planning to submit a proposal must indicate their intention to submit by email by **3:00 pm November 18, 2019**. Any questions that proponents have regarding this RFP must also be submitted by 3:00 pm on November 18, 2019. All intentions to submit and questions must be sent to michael.anhorn@cmha.bc.ca.

CMHA will distribute responses to all questions to all proponents who have submitted an intention to submit no later than 4:30 pm on November 22, 2019.

Qualifications

The successful proponent will have:

- training in the national standard for psychological health and safety in the workplace and its implementation;
- A master's or higher education in organizational psychology, organizational development, business, not-for-profit management, change management or a related discipline;
- experience working in or with unionized employers in the not-for-profit sector, ideally in the health and social services sub-sectors;
- experience working with a diverse staff group;
- extensive and documented experience supporting not-for-profit organizations to implement current best practices related to psychological health and safety in the workplace;
- proven ability to support change in an organization's culture;
- excellent communication skills;
- excellent group facilitation skills;
- excellent report writing skills; and
- proven ability to complete projects on-time and within budget.

Proposals

Interested consultants are invited to submit a maximum 8 page proposal (plus cover email, résumé, and appendices) by 3:00 on December 2, 2019. Proposals will contain the following sections:

1. Executive summary (max 1 page)
2. Qualifications and experience of personnel (max 2 pages)
3. Proposed process and timelines to achieve the deliverables (max 2 pages) (draft agendas for staff meetings and/or educational sessions may be included in an appendix)
4. Description of the content of the deliverables that will be produced and the deadline by which each deliverable will be provided to CMHA-VF (max 2 pages)
5. Pricing (base price for the process leading to each deliverable as outlined in the 'Deliverables' section, and hourly rate for additional work as may be requested and approved by CMHA-VF). Please clearly indicate if GST is included in or additional to prices quoted.

In this section, please include a description of any value added services and/or discounts you propose to provide to CMHA-VF (max 1 page)

Applicants are strongly encouraged to include a résumé or curriculum vitae as an appendix to their proposal.

Evaluation Criteria

Mandatory Criteria: The proponent and proposed team must be free from conflicts of interest.

Proposals will be evaluated using the following criteria and weighted scoring.

| Section | Evaluation Criteria | Weighting |
|---------------------------------|--|-----------|
| Qualifications | The extent to which the proponent meets or exceeds the qualifications outlined in the RFP. | 20% |
| Proposed Process | Level to which the process is perceived to engage staff and facilitate cohesion and common understanding. How realistic the timelines appear to be and how practical the process is perceived to be to implement. | 25% |
| Deliverables | The extent to which the proposal demonstrates the proponent's understanding of current evidence-based practices. The extent to which the proposal demonstrates the proponent will provide realistic and implementable recommendations. | 20% |
| Price | Price will be evaluated according to the overall cost to the organization and how realistic the pricing is for the work committed to. | 10% |
| Value Added | Extent to which the organization will receive from the proponent benefits beyond the process and deliverable. This includes any discounted rates offered to the organization. | 10% |
| Overall quality of the Proposal | The extent to which the proposal is clear, concise and compelling. | 10% |

Evaluation Process

All proposals received by the deadline will be reviewed by a joint committee of union and management staff. Each member of the joint committee will score each proposal against the criteria listed above. The Committee will then meet to review the collective scoring to ensure common understanding of the proposals.

The Joint Committee reserves the right to request the three top scoring proponents to attend interviews where the proponents will present their proposed process and answer a standard set of questions related to the criteria outlined above.

Schedule A – Respectful Workplace Charter

Respectful Workplace Charter

Co-authored by the CMHA Vancouver Burnaby Staff Team (2012)

The Canadian Mental Health Association Vancouver Burnaby Branch is committed to nurturing and maintaining a safe working environment where all team members are treated with respect and dignity and can contribute to a productive and professional atmosphere. Our Respectful Workplace Charter is intended to provide a foundation for how we conduct ourselves in our workplace. It is based on our values and is a commitment to create a cohesive organizational culture with shared, respectful norms.

For our team, safety means having confidence that our workplace supports our physical, emotional and social well-being. As well, safety means I am encouraged to express myself without fear of judgement or reprisal.

We Value: Respect

We respect and value each other. This includes making a choice and a commitment to speak up respectfully whenever work related issues or behaviours arise that affect our working relationships, the effectiveness of our team or make us feel uncomfortable, unsafe or disrespected.

We Value: Communication

We share knowledge that impacts and enhances the department and our service levels either verbally or through email on an ongoing basis and as required.

We respectfully deliver and receive constructive and supportive feedback.

We respond to diverse or dissenting perspectives with curiosity and inquisitiveness and remain open and compassionate in our interactions with each other.

We commit to having respectful conversations with our colleagues to resolve issues and are patient, respectful and non-judgemental when these issues arise. If we are unable to resolve an issue, we will speak with our supervisor or other levels of leadership as appropriate, who will assist us in coming to resolution.

We Value: Caring

We display an attitude and behaviour that demonstrate consideration of others and that maintain healthy and respectful boundaries.

We Value: Acknowledgement

We look for informal and formal opportunities to let our colleagues know when they have done a good job or their actions have been appreciated.

We Value: Diversity

We acknowledge the uniqueness of each individual, strive to be mindful of our own internal biases and be non-judgemental of others. Diversity can include, but is not limited to, race, color, sexual orientation, religion and physical ability.

We Value: Accountability

We take initiative to improve work-related processes and make suggestions to improve the team's processes and outcomes.

We, including management employees, are all accountable for creating an environment that is respectful and safe.

Schedule B – Psychologically Safe Workplace Policy

Policy Name: HS – Psychologically Safe
Workplace Policy

Approved on: May 10 2016

Approved by: Leadership Team

Definition

A psychologically healthy and safe workplace is one that promotes employees' psychological well-being and actively works to prevent harm to employee psychological health due to negligent, reckless or intentional acts. *Guarding Minds @ Work*

Policy

The Canadian Mental Health Association Vancouver Fraser Branch is committed to nurturing and maintaining a safe working environment where all team members are treated with respect and dignity and can contribute to a productive and professional atmosphere.

Workplace psychological safety is demonstrated when workers feel able to put themselves on the line, ask questions, seek feedback, report mistakes and problems, or propose a new idea without fearing negative consequences to themselves, their job or their career.

The Branch believes all employees should be able to work in an environment of mutual respect, dignity, compassion and one that is free of bullying. Managers and supervisors must ensure employees are not bullied and this Policy is one step toward ensuring that our workplace is a safe place for all.

Behaviours that are unacceptable in our workplace include:

- **Discrimination** - making a distinction against a person based on the group, class or category to which that person belongs. Discrimination can take place on the basis of sex, race, religion, physical or mental disability, sexual orientation, age and other factors.
- **Psychological harassment** - persistent and repetitive aggressive behaviours with the intention to victimize the target and damage their physical and mental health.
- **Rudeness or incivility** - offensive, unacceptable and inconsiderate behaviour.
- **Sexual harassment** - unwelcome conduct, of a sexual nature, that detrimentally affects the work environment or leads to adverse consequences for the target.
- **Workplace bullying** - refers to *repeated*, unreasonable actions of individuals (or a group) directed towards a staff member or volunteer (or a group of employees/volunteers), which are intended to intimidate, degrade, humiliate, or undermine; or which create a risk to the health or safety of the employee(s).
- **Workplace mobbing** - group bullying or a collective campaign by co-workers to exclude, isolate, punish or humiliate a targeted worker.
- **Workplace violence** - any incident where persons are abused, threatened or assaulted in circumstances related to their work, involving a direct or indirect challenge to their safety, well-being or health.

Procedure

When a staff member notices that unacceptable behaviour is occurring in the workplace the following process is in place to immediately address the behaviour.

1. Direct communication - If the behavior is directed towards you, firmly tell the person that his or her behaviour is not acceptable and ask them to stop. You can ask a supervisor or union member representative to be present when you approach the person. If you notice bullying behaviour directed towards a colleague, speak with that colleague about what you witnessed and encourage/support them to speak directly to the person displaying the behaviour.
2. Document - Keep a factual written record of the event(s) including a description of what happened, the date and time, the people who were involved, the people who witnessed the event(s) and what actions were taken to address the situation. Use direct quotes whenever possible.
3. Lodge a complaint - Report the incident to your supervisor and/or the HR Manager immediately. This report should be in writing with specific allegations including dates, times and names of any witnesses. Any reports of workplace bullying will be treated seriously and investigated promptly, confidentially and impartially.
4. Investigation - The HR Manager will contact the alleged bully in writing and notify them about the details of the complaint. The HR Manager will meet with the person reporting the bullying to obtain their full report. The HR Manager will then interview the alleged bully with a union shop steward present. If the allegations are of a very serious nature, there will also be a second representative of the employer present (i.e. Executive Director or another management staff). If the accused person admits to the behaviour, appropriate action will be taken which may include but is not limited to disciplinary procedures or referral to support services – e.g. anger management counselling. If the alleged bully disputes the allegation, further investigation will be carried out in an attempt to determine the facts. This will include the HR manager meeting with the complainant again as well as with available witnesses.
5. Findings – The HR Manager will complete a written report on the findings of the investigation. The HR Manager will then meet with both parties individually to explain to them the findings of the investigation as well as provide a summary in writing. If the allegation cannot be substantiated, this does not necessarily mean the bullying did not occur. In these instances, the Employer will need to identify what can be done to assist the individuals to return to a working relationship.
6. Appeal - If warranted by either party, the decision of the employer can be appealed through the grievance process.
7. Review - The HR Manager will ensure the resolutions and the continuing well-being and behaviour of all parties are reviewed with the complainant and alleged bully for a period of time following resolution until the actions to stop the bullying have been effective to the satisfaction of the Manger and the Complainant.
8. If the HR Manager is the subject of a complaint under this policy, the Executive Director will act in the HR Manager's place.

9. If the Executive Director is the subject of a complaint under this policy, the HR Manager will work with the chair of the Board of Directors in responding to the complaint.

Related Governance Policies

Related Policies and Forms

CC – Code of Ethics

FORM – Code of Conduct

Approval

This policy was approved by the Leadership Team on the date indicated above.

Executive Director

Date

History

| Version | Policy Name | Reason | Date |
|---------|---------------------------------------|--------------------------|--------------|
| 1 | Psychologically Safe Workplace Policy | Original Policy | Jan. 22 2013 |
| 2 | Psychologically Safe Workplace Policy | Imported to new template | Sep. 9 2014 |
| 3 | Psychologically Safe Workplace Policy | Updated Definition | May 10 2016 |

Schedule C – Guarding Minds at Work Summary Results

