## How to use this document

* Please note that this document is meant to be generic and may not contain all the information required for your specific situation.
* It is highly recommended that you consult your Procurement team to determine the best vehicle and requirements for your situation.
* The information included in this document is meant to be generic enough to satisfy various procurement methods:
  + For ProServices, you may refer to the following site for guidance:
    - <https://www.tpsgc-pwgsc.gc.ca/app-acq/sp-ps/gestiondeprojets-projectmanagement-eng.html#e1>
    - 5.1 Change Management Consultant
  + For TSPS projects (Task Based Supply Arrangement), you may refer to the following site for guidance (including Flexible Grids):
    - <https://www.tpsgc-pwgsc.gc.ca/app-acq/spc-cps/aact-tbps-anna-eng.html>
    - 2.6 Change Management Consultant
* Replace text that is red and/or underlined with text that is appropriate to your requirement;
* Confirm and/or replace text that is blue based on your requirement and/or preferences;
* When deciding on the Technical Evaluation Criteria, it will be important to decide the percentage you would like to allocate to merit vs. cost. A general recommendation is to allocate 70% based on merit and 30% based on cost, however, this may not suit your organizations’ standards.

**IMPORTANT**

* **The following requirements may influence the quantity of bidders who can meet your requirements**. Note that being too restrictive may result in an unsuccessful tender process.
  + Asking for 1 (one) resource vs. a team of resources. Smaller suppliers may not have sufficient resources to provide a team.
  + Location requirements. Permitting telework may expand the pool of potential candidates.
  + Language requirements. Asking for resources to deliver all services in both official languages will greatly limit your pool of candidates. It is recommended you ask for the documentation in the primary work language of your organization.

## STATEMENT OF WORK

1. **TITLE**

Change Management consulting services to support [THE ORGANIZATION’s] [NAME OF PROJECT e.g. Workplace Transformation Initiative].

1. **OBJECTIVE**

The project management office within [THE ORGANIZATION], requires the services of Change Management consultant[s] to assess change management needs, develop change management plans and the related products and tools to support the implementation of their workplace transformation change management strategy in the targeted areas.

**3.0** **BACKGROUND**

[INCLUDE INFORMATION ABOUT THE DRIVER FOR THE CHANGE] As part of their GCworkplace implementation (<https://www.tpsgc-pwgsc.gc.ca/biens-property/mt-wp/mt-wp-eng.html>), [THE ORGANIZATION] is developing an approach to modernize its workplace in order to support their vision:

* to create a collaborative and innovative office environment to support knowledge-work, and empowered employees; and to support employees’ wellness and productivity;
* to increase flexibility to work anywhere, anytime while maintaining responsiveness and security;
* to demonstrate workplace leadership as a department;
* to deliver on Destination 2020 commitments.

[THE ORGANIZATION’s] [NAME OF PROJECT] will drive change under three integrated areas. These areas of change are:

* The workspace (physical)
* The technology (virtual)
* The behaviour and culture

[THE ORGANIZATION’s] [NAME OF PROJECT] is comprised of multiple high complexity projects under each integrated area such as:

* New technology deployment;
* Implementing a new information management culture;
* Moving all employees to both swing space and end state solutions.

The changes will occur over [X] year period and touch [X] employees. The nature of the successive changes and the resulting impacts on employees require strategic change management planning. One of the main factors in effectively implementing the change management strategy is through people centered change. The full benefits of the transformation will not be realized without successful integration and acceptance of behavioural and culture changes impacting employees in how, when and where they work.

People centered change is described as removing barriers so that people can realize the full benefit of implementing a change through improving awareness, increasing the desire for change, providing them with the knowledge they need to implement the change, ensuring they have the ability to implement the change and reinforcing the change.

[Prosci is an example of methodology, you can update this section based on your organization’s preferred methodology]

The main change management methodology to be applied to the change projects is Prosci with some adaptations to better fit the needs of [THE ORGANIZATION]. All analysis and change management activities must align with this methodology.

Prosci is an independent research organization and conducts surveys of over 2,600 companies worldwide to identify change management best practices. Their methodology is built based upon these best practices. They focus on publishing reports and providing training on change management and maintain their research objectivity by not providing consulting services. More information is available on the Prosci website: [www.prosci.com](http://www.prosci.com)

The foundation of the Prosci methodology is the ADKAR model which recognizes that change happens at the individual level by building the ADKAR elements. ADKAR stands for:

* Awareness–provides the “why” the change is happening;
* Desire–environment that provides the motivation and willingness for the change;
* Knowledge–is the information and learning needed to apply the change;
* Ability–removes the capability obstacles that could prevent the change;
* Reinforcement–sustains the change past the implementation phase.

**4.0 SCOPE OF WORK**

On an “as is and when requested” basis through the issuance of task authorizations (TA), the change management consultant[s] will assess change management needs, develop change management plans and related tools and products to support [THE ORGANIZATION] in the implementation of the workplace transformation initiative change management strategy in the targeted areas. This work will be conducted with a heavy emphasis on people centered change focused at the strategic change management level as well as in the integration level where change and project management integrate. All [or some] of [THE ORGANIZATION’s] employees will be impacted by the changes that will be deployed.

[THE ORGANIZATION] will implement the changes; however, the consultant[s] will be responsible for developing the plans, documents, tools and products as well as providing advice and guidance that support the implementation. The consultant[s] will work closely with [THE ORGANIZATION]’s [PROJECT TEAM] and ensure that all project information is up to date.

**5.0 PERSONNEL REQUIREMENT (EXAMPLE)**

The following resource categories and quantities are/may be required:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **RESOURCE CATEGORY** | **LEVEL** | **ESTIMATED**  **QUANTITY** | **SECURITY LEVEL** | **LANGUAGE PROFICENCY** | **STATUS OF RESOURCE** |
| 5.1 | Change Management Consultant | Senior | 1 | Reliability | Bilingual  (intermediate) | Required at contract award |

Many of the change management projects that fall under the workplace transformation initiative may run concurrently. The number of resources required to conduct the work may fluctuate depending on operational requirements and project timelines.

**6.0 SERVICES REQUIRED**

The change management consultant[s] will provide advice, assess change management needs, develop change management plans and design tools to support [THE ORGANIZATION’s] [NAME OF PROJECT]. This will include change management techniques to not only promote the change, reduce resistance, inform of the benefits of the change but also in:

* Assessing change management factors that will influence the approach and tactics used to change manage technology, space and/or culture/behaviour change projects as well as the integrated workplace;
* Developing change management plans, tools (including sponsorship roadmap and coaching), and products;
* Developing change management tools and products aligned to change impact assessment results for specific projects under [THE ORGANIZATION]’s [NAME OF PROJECT] including key performance indicators and critical success factors.

**7.0 TASKS**

Each task authorization will identify the specific tasks to be performed. The consultant[s] may be requested to perform, but not limited to, the following:

**A. Conduct information gathering:**

* Attending meetings;
* Consulting with project team;
* Consulting with the project managers responsible for each change project within the workplace change areas to gain an understanding of the project, the scope as well as the timelines of the change projects;
* Consulting with stakeholders.

**B. Provide consultative advice and coaching:**

* Creating, delivering and leading change activities and initiatives;
* Providing expertise, consultative advice, guidance and coaching to build project capacity to make effective use of change management strategies and related tools;
* Articulating the purpose of change in a manner that makes sense to staff and provides a compelling picture of the new organization;
* Supporting change management at the organizational level by engaging and coaching supervisors, managers and senior leaders; and
* Coaching employees on the value of their contribution within the new organization.

**C. Develop, maintain and update change management project plan for specific projects that include weekly status reporting and:**

* Indicating a list of all deliverables with a description for each;
* Including tasks to complete the change management plan, activities, tools and products;
* Schedule for each task and key milestones so that the change management plan deliverables align with the timelines of the change project plan for the given project;
* Defined roles and responsibilities; and
* Recommended best approaches, solutions, risks and risk mitigations which may include, but is not limited to, adjusting the pace of change roll out, flagging contextual factors that influence the choice of approach and identifying issues that need to be resolved to ensure the success of the changes.

**D. Develop, maintain and update change management strategy for overall project:**

* Developing and applying change management processes and tools to help create a change management strategy/program to support adoption of the changes; and
* Conducting impact analyses, assessing change readiness and identifying key stakeholders.

**E. Develop, maintain and update change management plans for specific projects:**

The change management plans must follow the Change Management methodology set out by [THE ORGANIZATION] and may include the following:

* + Basic information about the given project;
  + Describing the scope, change management objectives and duration of the changes for the given project, while demonstrating that the project plan falls within the parameters of the approved budget and timelines;
  + Performing research, collecting information, conducting analysis, providing reports and expert advice in the area of change management, for specific change projects, including:
  + Assessing and describing organization readiness for change;
  + Assessing and describing the nature of the changes;
  + Assessing and describing the change impacts on stakeholders;
  + Assessing and describing the change management risks; and
  + Identifying and describing which change management tactics are best suited for the [THE ORGANIZATION]’s context, business requirements and priorities, and organizational culture.
  + Describing in detail the change management approaches in terms of timelines and what’s required for the following:
* communications;
* engagement;
* sponsors;
* equipping managers so they can help their employees deal with change; and
* change management training including preparing decks for presentations.

**F. Develop change management tools, products and communication products for specific projects:**

The change management tools, products and communication products must follow [THE ORGANIZATION]’s change management methodology and Internal Communications requirements and may include:

* Preparing content with embedded ADKAR change management elements for messaging and engagement at various levels (including departmental, sector, functional community, employee and senior executives) and delivered by the project team, sponsors, projects and other change management stakeholders. This will likely be done in consultation with Corporate Communications and the project managers, as specified in each TA.
* Preparing and developing content, using various vehicles and formats, to engage employees and raise awareness, desire for the changes, knowledge about the project and its changes, the ability to integrate the changes as well as reinforce the changes. This will likely be done in consultation with Corporate Communications and the project managers, as specified in each TA.

**G. Develop, maintain and update performance evaluation framework:**

* Evaluating the effectiveness of the change management initiative;
* Developing performance measurement/evaluation frameworks;
* Integrating performance monitoring disciplines in an organization's development or change management plan; and
* Carrying out performance monitoring and reporting activities on change management.

**8.0 GOVERNMENT FURNISHED EQUIPMENT/INFORMATION**

The consultant[s] must provide their own technology equipment and MS Office Suite compatible software.

[THE ORGANIZATION] will provide:

* temporary short term workspace (such as hoteling stations) on site and access to relevant information as needed to the consultant[s];
* guidance documents and templates by the PSPC (Public Services and Procurement Canada) Change Management Centre of Expertise that can help shape the development of [THE ORGANIZATION’s] change management plans, tools and products.

**9.0 DELIVERABLES**

Each Task Authorization will identify the specific deliverables that must be submitted. All deliverables to be submitted at the 50% draft mark for review by the project team.

The consultant[s] may be requested to deliver, but not limited to, the following:

**A. Information gathering**

* Ad-hoc updates or reports based on consultations with various stakeholders

**B. Integrated change management project plan:**

* indicate deliverables and a description of each deliverable; include tasks to complete the change management plan and activities, tools and products;
* schedule tasks and key milestones so that the change management plan aligns with the timelines of the integrated project ;
* identify roles and responsibilities;
* recommend best approaches, solutions, risks and risk mitigation; this may include, but is not limited to, adjusting the pace of change roll out, flagging contextual factors that influence the choice of approach and identifying issues that need to be resolved to ensure the success of the changes, and,
* contribute to maintaining and updating integrated project plan.

**C. Integrated change management strategy and change management plans for specific projects within the three areas of change (tech, space and culture/behaviour):**

Basic information about the project that may include scope, change management objectives and duration of the changes for the given project, budget and timelines;

* information, analysis and assessment of stakeholder impacts, nature of the change, risk management and other impacts;
* research and recommendations in the area of change management, for specific change projects;
* change management tactics which are best suited for [THE ORGANIZATION’s] needs;
* detailed change management approaches in terms of timelines and what’s required for the following:

o communications;

o engagement;

o sponsors;

o equipping managers so they can help their employees deal with change;

o change management training; and

o Listing and detailed descriptions of the engagement activities, tools and products that the Consultants will develop to support [THE ORGANIZATION] implementing the change management plan.

**D. Change management activities, tools and products at the integrated level and for specific changes (and change projects) developed in collaboration with [the organization’s]** **corporate/internal communications group and the project managers**.

* Develop content with embedded ADKAR change management elements for messaging and engagement at various levels (departmental, sector/teams, functional community, management, employee, senior executive) and delivered by the WRI team, sponsors, projects and other change management agents (leaders, managers, influencers, etc.);
* Develop and implement tools and products to engage employees and raise awareness, desire for the changes, knowledge about the project and its changes, the ability to integrate the changes as well as reinforce the changes including, but not limited to:

o Internal newsletter;

o Internal web site;

o GCPedia/GCconnex (internal collaborative web platforms);

o Blogs;

o Social media;

o Questions and answers;

o Lunch and learns/Face to face informal discussions;

o Functional community meetings;

o Emails and distribution lists;

o Presentations;

o Consultations / focus groups

o Formal training sessions;

o Surveys and Questionnaires;

o Open houses and tours;

o User guidance material on new technology, processes, and space occupancy.

**9.1 Format of deliverables**

Each Task Authorization will identify the specific format of the deliverables.

The Contractor’s resources may be requested to provide the deliverables in, but not limited to, the following formats:

* MS Office, Visio, MS Project software;
* Soft copy in fully editable format; and
* In line with GC Common Look and Feel and other internal guidelines.

**10.0 CLIENT SUPPORT**

[THE ORGANIZATION] and the project authority are responsible for:

* determining the budget and the targeted timelines for each project;
* providing the contact Project Manager (PM) for each change project associated with the [NAME OF PROJECT];
* coordinating the initial meeting between the PM and the consultant[s];
* ensuring that all relevant policies, frameworks are adhered to and respected in each change management plan;
* reviewing and approving all documentation proposed by the consultant[s];
* providing the consultant[s] with any relevant background information, toolkit(s), examples etc.;
* collaborating with the consultant[s] and providing timely information and project updates.

**11.0 LANGUAGE OF WORK**

Consultant[s] must be able to perform the work with communication skills according to table in [Appendix A] in both official languages. All documentation is to be produced in [primary language of work English or French].

**12.0 TRAVEL REQUIRMENTS**

Travel is not anticipated in the conduct of the work however, each Task Authorization will indicate whether or not travel will be necessary.

**13.0 LOCATION OF WORK**

The majority of work is expected to be performed on site at [THE ORGANIZATION] sites located in the [National Capital Region]. However, portions of the work can be completed at the consultant[s] location.

### Appendix a

### LANGUAGE GRID

|  |  |  |  |
| --- | --- | --- | --- |
| Legend | **Oral** | **Comprehension** | **Written** |
| **Basic** | A person speaking at this level can:   * ask and answer simple questions; * give simple instructions; and * give uncomplicated directions relating to routine work situations. | A person reading at this level can:   * fully understand very simple texts; * grasp the main idea of texts about familiar topics; and * read and understand elementary points of information such as dates, numbers, or names from relatively more complex texts to perform routine job-related tasks. | A person writing at this level can:   * write isolated words, phrases, simple statements or questions on very familiar topics using words of time, place or person. |
| **Intermediate** | A person speaking at this level can:   * sustain a conversation on concrete topics; report on actions taken; * give straightforward instructions to employees; and * provide factual descriptions and explanations. | A person reading at this level can:   * grasp the main idea of most work-related texts; * identify specific details; and * distinguish main from subsidiary ideas. | A person writing at this level can:   * deal with explicit information on work-related topics since they have sufficient mastery of grammar and vocabulary. |
| **Advanced** | A person speaking at this level can:   * support opinions; and understand and express hypothetical and conditional ideas | A person reading at this level can:   * understand most complex details, inferences and fine points of meaning; and * have a good comprehension of specialized or less familiar material. | A person writing at this level can:   * write texts where ideas are developed and presented in a coherent manner. |