

Request for Proposal (RFP)

Employee Onboarding Integration Project

Hamilton/Burlington SPCA (HBSPCA)

Submission Deadline: *Flexible — Preferred Completion by End of November 2025*

1. Introduction

The Hamilton/Burlington SPCA (HBSPCA) invites qualified vendors to submit proposals to design and deliver a comprehensive **Employee Onboarding Integration Plan**.

The goal of this project is to consolidate all onboarding processes, forms, and reference materials into a **single, integrated document or electronic platform** that simplifies the onboarding experience for both employees and managers.

The final product will provide a consistent, streamlined, and easily updatable onboarding process that improves efficiency, accountability, and accessibility across the organization.

2. Project Overview

Objective

The objective is to create a **centralized onboarding binder or digital system** that combines all administrative, HR, IT, and operational onboarding elements into one cohesive workflow.

The system should:

- Reduce administrative hours required for onboarding.
- Clearly define responsibilities by role (CEO Office, Director, Manager, Employee).
- Incorporate both internal documents and third-party tools (e.g., Payworks Canada, Citation Canada).
- Be easy to maintain and update.
- Allow customization for specific employee roles or departments.

The vendor will deliver a completed, ready-to-use onboarding document — with appendices, templates, and supporting resources — that can be deployed in both **paper and electronic formats**.

3. Scope of Work

The successful vendor will be responsible for designing a complete onboarding framework encompassing the following components:

A. Pre-Onboarding Preparation

- Integration of job description development templates.
- Development of employee payroll grid and compensation categorization.
- Creation of digital pre-employment paperwork submission process.
- Incorporation of required third-party forms and documents (e.g., Payworks Canada, Citation Canada).
- Standardized employment contract templates (supplied by Legal).

B. Day-One and Orientation Elements

- Development of a **Day One Guide** with clear instructions and checklist.
- Creation of a standardized welcome package (digital and/or physical).
- Integration of **safety training** modules and acknowledgment tracking.
- IT and access onboarding workflow, including:
 - Email setup
 - Cell phone assignment
 - Uniform distribution
 - Business cards
 - Security/access card setup

C. Policies and Program Inclusion

Incorporate or link to organizational and departmental policies, including:

- Transportation and Driving Policy (insurance coverage and responsibilities)
- Pet Policy and Foster Policy
- Employee Photo & Video Consent Policy
- Employee Giving and Engagement Opportunities
- Staff Discounts and Benefits Information
- Employee Code of Conduct (for reference only; not within vendor scope for HR policy creation)

D. System Integration and Design

- Creation of a **centralized, user-friendly process or binder** with modular sections for employee type/role.
- Integration of all relevant internal and third-party forms (e.g., Payworks, Adobe Sign).
- Include fillable and submission-enabled documents where applicable (e.g., upload photograph, e-sign forms).

- Ensure simplicity of updates and internal management — no complex software learning required.
- Recommend or align to existing HBSPCA platforms to avoid redundancy or excessive training.

E. Internal Engagement and Consultation

- Conduct up to **six (6) structured interviews** with staff and leaders involved in onboarding and orientation.
 - Collaborate closely with:
 - **CEO's Office** (Project Sponsor)
 - **Executive Program Assistant** (Project Coordinator)
 - Review all provided documentation, policies, and onboarding materials.
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4. Deliverables

The selected vendor will provide:

A. Comprehensive Onboarding Document or Digital Binder

- Fully organized onboarding framework categorized by role responsibility:
 - **CEO's Office** – strategic oversight and approvals
 - **Director** – departmental onboarding and compliance
 - **Manager** – operational onboarding and introductions
 - **Employee** – submissions, training, and acknowledgment tracking
- Clear visual format (fillable PDF or interactive digital layout).

B. Appendices Package

- Collection of supporting documents, policies, and templates.
- Integration of links to third-party portals and training platforms.
- Cross-referenced index for easy navigation.

C. Final Submission Package

- Complete master file in editable format (Word and/or PDF).
- Electronic delivery plus **one USB drive** containing all documents and templates.
- Option for print-ready binder layout (if requested).

5. Project Outcomes and Success Criteria

- **Single-source onboarding solution** accessible by all departments.
 - **Reduction in administrative duplication** and improved communication.
 - **Clarity in responsibility and accountability** across all onboarding roles.
 - **Ease of future updates** and adaptability to organizational growth.
 - **Alignment with HBSPCA technology and compliance platforms.**
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6. Timeline

Phase	Description	Target Completion
Phase 1	Project kickoff, document review, stakeholder interviews	Early November 2025
Phase 2	Draft development and integration of materials	Mid-November 2025
Phase 3	Internal review and feedback (CEO & Directors)	Late November 2025
Phase 4	Final revisions, delivery, and presentation	End of November 2025

Timeline is flexible and may be adjusted based on vendor recommendations.

7. Vendor Qualifications

Proposals will be evaluated based on the following qualifications:

- Demonstrated expertise in **HR onboarding process design** and **workflow integration**.
- Proven ability to **simplify administrative processes** and enhance digital accessibility.
- Experience working with **nonprofit or multi-departmental organizations** preferred.
- Familiarity with Canadian HR standards, digital signing tools, and IT onboarding best practices.
- Strong organizational, documentation, and communication skills.

8. Proposal Requirements

Interested vendors are asked to submit a proposal including:

1. **Overview of Approach:**
Describe your process for developing the onboarding integration system.
2. **Workplan and Timeline:**
Outline your proposed milestones and deliverable schedule.
3. **Experience and Examples:**
Provide relevant case studies or examples of similar projects.
4. **Project Team:**
Identify key personnel and their qualifications.
5. **Budget Estimate:**
Include itemized pricing (fixed fee preferred) with any additional costs clearly stated.

9. Evaluation Criteria

Evaluation Category	Weight
Project Understanding & Approach	30%
Experience with Similar Projects	25%
Quality and Feasibility of Workplan	20%
Cost and Value	15%
References & Presentation Quality	10%

10. Submission Instructions

Please submit your proposal electronically to:

Attn: CEO's Office

Hamilton/Burlington SPCA (HBSPCA)

Email: ExecProgAsst@hbspca.com

Subject Line: *RFP – Employee Onboarding Integration Project*

Questions or requests for clarification may be directed to the **Executive Program Assistant** prior to submission.



11. Contact Information

Project Sponsor:

John Gerrard, President & CEO
Hamilton/Burlington SPCA

Project Coordinator:

Executive Program Assistant – Shelley May
Hamilton/Burlington SPCA

12. Confidentiality

All materials provided to the vendor by the HBSPCA are confidential and must not be shared or reproduced without written consent. All final materials and intellectual property resulting from this project will be owned by the HBSPCA.

13. Closing Statement

The Hamilton/Burlington SPCA looks forward to partnering with a vendor who shares our vision for innovation, efficiency, and excellence in employee engagement. This project is a significant step toward modernizing our onboarding experience and ensuring every employee begins their journey at HBSPCA with clarity, confidence, and connection.

Authorized by:

John Gerrard

President & CEO
Hamilton/Burlington SPCA