

## **Request for Proposals**

### **National Operations and Member Services Management**

**August 1, 2018**

Proposals are due to the CES by Midnight, EST, **31, August, 2018**. Bidders are asked (but not required) to submit an email indicating their intent to submit a proposal by 2:00 pm, EST **on 10, August, 2018** to the President, CES Board ([cessce.president@gmail.com](mailto:cessce.president@gmail.com)). See Section 3.1 for instructions. Questions on this RFP are welcome before 2:00 PM, EST, 21, August, 2018. Please see Section 6.0 for further detail.

<b>1.0</b>	<b>BACKGROUND .....</b>	<b>3</b>
<b>2.0</b>	<b>PROJECT OVERVIEW .....</b>	<b>3</b>
<b>3.0</b>	<b>PROPOSALS .....</b>	<b>4</b>
3.4	PROFESSIONAL REFERENCES .....	4
3.5	ELIGIBILITY OF BIDDERS .....	4
3.6	PROPOSAL CONTENT.....	5
<b>4.0</b>	<b>SELECTION CRITERIA .....</b>	<b>5</b>
4.1	MANDATORY REQUIREMENTS.....	5
4.2	EVALUATION OF PROPOSALS.....	5
4.3	PROPOSAL SCORING .....	5
<b>5.0</b>	<b>GENERAL CONDITIONS.....</b>	<b>6</b>
5.1	RIGHT TO AMEND RFP.....	6
5.2	BIDDER-INCURRED COSTS .....	6
5.3	ACCEPTANCE OF PROPOSALS .....	6
5.4	FUNDING AND PAYMENT .....	6
5.5	OWNERSHIP .....	6
5.6	TERMINATION OF CONTRACT.....	7
5.7	INSURANCE .....	7
<b>6.0</b>	<b>BIDDING PROCESS .....</b>	<b>7</b>
6.1	BID DETAILS.....	7

## 1.0 Background

The Canadian Evaluation Society (CES) is a non-profit bilingual professional association dedicated to the advancement of evaluation theory and practice ([www.evaluationcanada.ca](http://www.evaluationcanada.ca)). To support the CES Board and membership, CES is looking for a contractor to provide National Operations and Member Services Management.

## 2.0 Project Overview

### 2.1 Purpose and Objectives

The purpose of this RFP is to solicit proposals for National Operations coordination and member services management. The contractor will be expected to work remotely under the supervision of the CES President. The start date will be in October 2018. The term for this work is 12 months with an expectation of approximately 200 days of work. The contract would be eligible for renewal after 12 months, depending on satisfaction and agreement between the contractor and CES.

### 2.2 Scope of Work and Deliverables

The contractor is required to perform the tasks listed below.

#### 1) Operations Management (75% of time)

- a) Under the direction of the President,
  - i) supports the Board, conference and other committees, and member services as they implement annual work plans in a coordinated way with consideration for national requirements and interdependencies.
  - ii) oversees CES service contracts and supports the development, implementation, and evaluation of these contracts with a particular focus on achieving key performance indicators, timeliness and budget issues.
  - iii) manages Secretariat's delivery of program services.
  - iv) ensures that corporate memory is maintained electronically.
- b) Under the direction of the Executive Committee of Board,
  - i) coordinates IT resources and contractors for an optimal user experience.
  - ii) contributes to the identification and evaluation of risks and implements measures to control risks as directed.
  - iii) contributes to the Board's efforts in renewing, implementing, and monitoring the strategic plan.
- c) In collaboration with the Treasurer, monitors and maintains CES budgets, including variance reporting and trend analysis.
- d) Manages the Secretariat as it coordinates and supports Board meetings (venue, reservations, budgeting, planning, arrangements)

## 2) Member Relations Coordination (25% of time)

- a) Coordinates and implements communications and engagement strategies involving the National Board and Chapters as approved by the National Board.
- b) Assists in resolving issues for members which cannot be resolved by the Secretariat or the Chapters.
- c) Works with the President to facilitate relationship-building with Chapters, partners, and other stakeholders as required.

## 3.0 Proposals

### 3.1 Intent to Submit a Proposal

Bidders are asked (but not required) to notify us of their intent to submit a proposal by **2:00 PM, EST, August 10 2018** via email to the CES President ([cessce.president@gmail.com](mailto:cessce.president@gmail.com)).

The bidder must submit an electronic copy of their proposal to the CES President via email to [cessce.president@gmail.com](mailto:cessce.president@gmail.com). Acceptable formats for the electronic version are \*pdf, \*doc or \*docx by **Midnight, EST, 31 August 2018**. Only electronic submissions by email will be accepted.

### 3.2 Length

Proposals will not exceed 10 pages, single-spaced with 1-inch margins and 12-point font (approximately 3,000 words) excluding references and appendices.

### 3.3 Identification of Bidders

If a team submits a bid, one individual must be identified as the principal bidder on behalf of the bid. All further communication with CES regarding the proposal and the contract, if awarded, will be via this individual. Further, if a proposal is submitted by more than one person, all participating individuals must be clearly identified in the bid proposal and a short Curriculum Vitae (CV) must be included for each person named.

Bids must identify the academic and/or practical qualifications, competencies, and experience of the bidder(s) as they relate to the identified scope of the contract.

### 3.4 Professional References

The bidder must provide the names and contact information of three references able to comment on the abilities of the bidder or team with respect to the services requested in this RFP. Please note that CES may contact some, none, or all references as it determines appropriate.

### 3.5 Eligibility of Bidders

This RFP is open to all bidders who meet the bid requirements indicated in this document with the following exception affecting a company in which a Board member or Board member's spouse, child, or grandchild is an employee or has an ownership interest. In this case, an employee of the company is eligible to respond to contracting opportunities if the Board member is not involved in any phase of the contracting process, does not use his/her position to influence a decision in the awarding of the contract, and declares the conflict of interest to the Board prior to the submission of a proposal.

### 3.6 Proposal Content

Each proposal must address the contractor's:

- Experience working with Boards in the not-for-profit sector
- Demonstrated administrative experience and coordination of not-for-profit organizations' Board activities.
- Understanding of non-profit operations
- Understanding of non-profit member services
- Ability to work collaboratively
- Understanding of the Canadian evaluation and professional association context
- Ability to perform all duties in both French and English
- Contingency plans to cover all contract responsibilities in the event of illness or injury involving one or more members of the bid team; and
- Willingness to obtain insurance coverage for general liability and/or errors and omissions (see Section 5.7)

## 4.0 Selection Criteria

### 4.1 Mandatory Requirements

Each proposal will be assessed based on the criteria indicated in Table 2, provided the following criteria are met:

- Proposal is received by **Midnight, EST, 31 August 2018**.
- Proposal budget does not exceed \$65,000 (inclusive of fees, expenses and taxes and exclusive of travel)
- Rates and availability are outlined in the proposal (exclusive of taxes but inclusive of all expenses except travel).
- Inclusion of additional items as separately priced bids are acceptable should the bidder wish to propose one or more ideas beyond the scope of this RFP for consideration.
- Some travel is required. Travel will be reimbursed at cost and/or according to CES travel policies and does not need to be included in the proposal.
- English is the primary language for this contract. Bilingual capacity (equivalent to Federal level CBC) is required.
- The length and format of proposal as per Section 3.2 of this RFP.
- Each team member is identified if the proposal is submitted on behalf of more than one person.
- A team leader is identified if the proposal is submitted on behalf of more than one person.

### 4.2 Evaluation of Proposals

A minimum of three members of the CES Board will form a proposal review committee to evaluate all complete proposals. The CES reserves the right to negotiate further with one or more bidders.

### 4.3 Proposal Scoring

Each proposal will be assessed based on the criteria indicated in Table 1 if the mandatory requirements in Section 4.1 are met:

Table 1. *Proposal Scoring.*

<b>Criteria</b>	<b>Points</b>
Evidence of experience in providing operational support for a non-profit organization and working with a Board of Directors	25
Evidence of experience in providing services to members	25
Evidence of facilitation and collaboration skills	15
Evidence of project management skills	15
Proven ability to work effectively with multiple stakeholders	10
Clarity, organization, completeness and professional appearance of proposal	5
Value for budget	5
<b>Total Possible Points</b>	<b>100</b>

Proposals must meet a minimum scoring of 70 points to be screened in for assessment.

## 5.0 General Conditions

### 5.1 Right to Amend RFP

The CES reserves the right to amend or supplement the RFP, giving equal information and cooperation by way of issued addenda to all potential bidders through the CES website ([www.evaluationcanada.ca](http://www.evaluationcanada.ca)).

Bidders who have indicated their intent to bid will receive email notification of any amendment or supplement. Please see Section 6.0 for instructions on how to indicate intent to bid.

### 5.2 Bidder-Incurred Costs

All costs incurred in the preparation and presentation of proposals in any way whatsoever will be the responsibility of the bidder(s).

### 5.3 Acceptance of Proposals

The CES is not bound to accept the lowest price or any proposal of those submitted. Proposals will be assessed based on the criteria specified in Section 4.0 above.

### 5.4 Funding and Payment

Bidders are to provide an hourly rate (or rates if a team is bidding) for the services requested in this RFP, in Canadian dollars, exclusive of applicable taxes but inclusive of all expenses except travel for CES activities. Payment for contractor services will be made on a monthly basis upon receipt of an invoice outlining hours for services provided.

### 5.5 Ownership

All materials created through this contract shall be the property of the CES and shall not be published, released, or used for training others without the written consent of the CES.

#### 5.6 Termination of Contract

A contract awarded on the basis of a response to this RFP may be terminated by either party with a 30-day notice, with outstanding payments to be negotiated between the contractor and the CES.

#### 5.7 Insurance

The contractor will be required to maintain:

- Comprehensive General Liability Insurance throughout the term of the Agreement in the amount of not less than \$2,000,000 and
- Errors and Omissions Insurance throughout the term of the Agreement in the amount of not less than \$1,000,000.

### 6.0 Bidding Process

Should prospective bidders have any questions regarding this RFP, they may contact the CES President in writing prior to **2:00 PM, EST, 21, August 2018** using the following email address: [cessce.president@gmail.com](mailto:cessce.president@gmail.com). Questions and responses may be shared with all bidders.

Bids are due at midnight, EST, August 31, 2018. Bids may be submitted to: [cessce.president@gmail.com](mailto:cessce.president@gmail.com)

#### 6.1 Bid Details

<b>Bid Stage</b>	<b>Deadline</b>	<b>Contact</b>
Registration of interest	August 10, 2018 (2pm, EST)	<a href="mailto:cessce.president@gmail.com">cessce.president@gmail.com</a>
Questions	August 21, 2018 (2pm, EST)	<a href="mailto:cessce.president@gmail.com">cessce.president@gmail.com</a>
Submission of bid	August 31, 2018 (midnight, EST)	<a href="mailto:cessce.president@gmail.com">cessce.president@gmail.com</a>