



Request for Proposals:

Diversity, Equity & Inclusion Strategy

Release Date: Feb. 1, 2022

Closing Date: Feb. 28, 2022

Project Manager

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The Canadian Society of Association Executives (CSAE) invites qualified bidders to submit proposals to develop a diversity, equity and inclusion (DEI) strategy for CSAE as detailed below.

Background

Incorporated in 1962, the Canadian Society of Association Executives (CSAE) is Canada's only member-based not-for-profit organization committed to delivering the knowledge, resources and environment to advance association excellence. CSAE, also known as an "association of associations," offers robust networking and learning opportunities, including an education program leading to the Certified Association Executive (CAE®) designation. With a current membership of approximately 3,000, CSAE has central operations in Toronto and eight regional networks in BC, Alberta, Saskatchewan, Manitoba, the GTA/Golden Horseshoe, Ottawa-Gatineau, Quebec and Atlantic. Volunteer network councils support the planning and delivery of events and educational opportunities at the local level, offering robust opportunities for association and not-for-profit professionals to learn, connect and excel.

Structure

CSAE is governed by a volunteer board of directors and has a staff of 14 full-time employees. Approximately 124 volunteers sit on network councils, committees and working groups to help advance the work of the organization.

Vision, Mission and Values

Vision: To empower associations to transform the world.

Mission: To deliver the knowledge, resources and environment to advance association excellence.

Values:

Leadership
Inclusion and diversity
Innovation and creativity
Collaboration and teamwork
Trust and integrity

CSAE's 2020/21 annual report is available [here](#). You can also visit www.csae.com for further information

Strategic Plan

CSAE undertook a strategic planning process in 2021, to develop a four-year strategic and tactical plan. Throughout the process, the member voice was captured through qualitative and quantitative research, key informant interviews and roundtable discussions. The Board of Directors led the initiative with support and input from the President & CEO and the CSAE leadership team. Key volunteers from across the country, including CSAE's eight regional networks, were instrumental in informing this strategy.

One of the strategies in the [strategic plan](#) is to **be a model for continuous improvement**. In support of this priority, CSAE seeks to develop a DEI strategy to help CSAE articulate its vision for DEI, establish key priorities for its work in this area and create an action plan to guide this work over the next several years.

Scope of Engagement

CSAE is committed to pursuing DEI at all levels of the organization—including in how we build our boards, teams, cultivate leaders, engage in partnerships, and deliver programs and services to our members and the association sector more broadly in Canada. As an integral part of our strategic plan, CSAE is ready to take its next steps to create a workplace and culture that fosters inclusion and equity and values diversity in all its forms, and in so doing become a model for other associations.

Purpose

The purpose of this RFP is to secure a forward-thinking, solutions-driven DEI consultant or firm to develop a DEI strategy reflective of CSAE's organizational values and DEI ambitions. We aim to create a culture of DEI that is accountable, sustainable and scalable. This journey would be a model for other Canadian associations to emulate in their own efforts with respect to DEI.

Scope of Work and Deliverables

The following represents the anticipated activities and deliverables to be conducted by the selected vendor. As we seek external expertise and perspective, we may consider an alternate approach if the applicant proposes one that aligns with our objectives for this work.

1. Conduct a robust assessment (qualitative and quantitative) of the state of DEI at CSAE.
2. Lead CSAE in articulating a clear vision for DEI at CSAE that is aligned with its mission, vision and values as well as the current Strategic Plan.

3. With the DEI vision as the anchor, develop a comprehensive DEI strategy and action plan. This must include short-term and longer-term DEI goals, as well as short-term and longer-term monitoring and evaluation methods to understand, enhance and sustain DEI initiatives.

Timeline & Budget

CSAE is seeking creative proposals that can deliver the scope of work in a cost-effective way without compromising quality. All proposals should include a proposed budget and timeline, costed out for each phase of the proposed work.

The term of this engagement is for three (3) months beginning April 1, 2022. An initial discussion with the Board of Directors, if feasible, would take place on April 5, 2022.

The budget range for this project is \$15,000 to \$20,000 CAD, inclusive of all costs.

Closing Date and Time

Proposals must be received by the Director of Marketing & Communications by **5:00 pm EST on Monday, Feb. 28, 2022**. CSAE will not consider any proposals after this closing date and time.

Clarification Questions

Requests for clarification shall be submitted via email to penny@csae.com between Feb. 1 and Feb. 18, 2022, as noted in the RFP Timeline below.

CSAE may at any time after submission, request that bidders provide proposal clarification in writing, or through a phone call or virtual meeting.

RFP Timeline

- Feb. 1, 2022 - RFP released by CSAE. Questions will be accepted between Feb. 1 and Feb. 18, 2022 at 5:00 pm EST.
- Feb. 28, 2022 - RFP submissions must be received by Monday, Feb. 28, 2022, at 5:00 pm EST.
- Mar. 11, 2022 - Review of submissions completed by CSAE. Short list identified.
- Mar. 15 – 26, 2022 – Short list contacted and meetings scheduled.
- Mar. 28 – April. 1, 2022 – All bidders contacted with results of review and contract awarded.

This schedule is for information only and may be amended if necessary at CSAE's discretion.

Should CSAE decide to extend the submission deadline, it shall promptly communicate its intention by issuing an extension to all respondents before the submission deadline.

Submission Requirements

Proposals shall be submitted as a PDF via e-mail to penny@csae.com by Monday, Feb. 28, 2022, at 5:00 pm EST. It is the responsibility of the bidders to ensure that the e-mail submissions are received by CSAE.

Proposals must include the following components, each in appropriate detail:

- a. Name of the consultant or firm and name of the representative submitting the proposal, including all contact information.
- b. A detailed overview of you or your firm and its ownership/organizational structure, mission, culture and number of employees. Include information on the diverse perspectives you/your team brings to this work.
- c. A summary of the qualifications of the individuals who will be working on this project.
- d. Company expertise and experience: Describe your expertise and specific consulting approach when partnering with a small not-for-profit organization. Articulate what makes your approach unique and effective. Describe your expertise specifically in DEI strategy development and implementation of DEI initiatives. Describe the DEI-related work you have most recently completed for organizations similar in size and scope to CSAE.
- e. A minimum of three other organizations similar in size and scope to CSAE that engaged you as a DEI consultant to serve as business references.
- f. It is expected that this assignment will be conducted virtually. Describe how you/your firm will manage the assignment virtually and what resources will be used to assure active and timely communications and engagement with CSAE.
- g. Timeline and fees table net of taxes in CAD funds.
- h. A signed statement regarding the independence status of the bidder with CSAE, including a declaration that any of the bidder's employees or its subcontractors' employees do not and will not have an actual or potential conflict of interest in submitting the proposal to this RFP or, if selected, as the supplier under contract.

CSAE is dedicated to promoting diversity in its procurement of goods and services. CSAE does not discriminate based on race, colour, religion, sex, sexual orientation, gender identity or gender expression, national origin, age, disability, or based on an individual's status in any other group or class. All qualified applicants, including minorities, women, and individuals with disabilities are encouraged to apply.

Should you require accommodations in submitting your proposal, please contact Penny Tantakis at penny@csae.com.

Evaluation Criteria

- a. Firm /Consultant experience and proven outcomes (35%)
- b. References (20%)
- c. Proposed work-plan (35%)
- d. Price (10%)

Questions and Proposal Submissions must be submitted via email with subject line “DEI Proposal” to the attention of:

Penny Tantakis
Director, Marketing and Communications
penny@csae.com

Additional Detail

In the event that CSAE is unable to successfully finalize the contract with a selected bidder in a timely manner, CSAE may, without liability, cost or penalty, in its sole discretion:

- Extend the period for negotiation or execution; or
- Cease negotiations with the selected bidder; or
- Cancel this RFP; or
- Enter into negotiations with another bidder.

No Obligation to Purchase and Costs Related to this RFP

- Nothing in this RFP, receipt of proposals, negotiations of the terms of the contract to supply, shall impose a legal obligation on CSAE to make any purchases from any bidder.
- Nothing in this RFP, receipt by CSAE of a response to this RFP, or subsequent negotiations by CSAE of terms of a contract to supply, shall in any way impose an obligation on CSAE to reimburse any bidder or to pay any compensation for costs incurred in the preparation of a response to this RFP, presentations, or the negotiation of a proposed contract.

Ownership

The information, reports, documentation, plans, etc. that are a product of this award to the successful firm, will become the exclusive property of CSAE. However, intellectual property, such as specific tools, templates, processes, etc. that the firm has provided as part of the deliverables for this project remains the property of the firm and the firm is free to use any of such material in other contexts and with future clients.

Confidentiality Understanding

CSAE and the bidder will treat the information exchanged through this RFP process as confidential.