



Canadian Evaluation Society

Request for Proposals for

Development of an e-Institute course provisionally titled, *Ethical Practice for Canadian Evaluators*, and complementary course materials.

January 2024

Contract Title: Development of an e-Institute course provisionally titled, *Ethical Practice for Canadian Evaluators*, and complementary course materials.

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). To support professional development needs, CES operates the [CES e Institute](#), an online, bilingual, professional development platform designed by and for evaluators. All CES e-Institute courses reflect best practices in adult online education and align with the [Canadian evaluation standards, ethical guidance](#), and [competencies for Canadian evaluation practice](#). The e-Institute is supported by a Curriculum Advisory Board and time-limited course-specific reference groups.

Some [e-Institute courses](#) are offered as independent, self-directed on-demand courses while others operate as scheduled online facilitated cohorts which are led by approved facilitators and educators. The present course is of the first type.

Contracting Parties

The contracting parties will be the Canadian Evaluation Society and one or a team of consultants, called herein 'The Bidder.'

Effective Date

The contract will be effective March 1, 2024.

2.0 Purpose

This request for proposals provides the terms of reference for the development of a new e-Institute course provisionally titled *Ethical Practice for Canadian Evaluators*, and supporting course materials. This suite of professional development products reflects the CES commitment to professional ethics founded on underlying core values:

- Upholding the rights and well-being of persons, Peoples and all of nature;
- Seeking truth, honesty, and transparency; and
- Being responsible to all engaged in or affected by their evaluation work.¹

The course will complement other supports for ethical practices in the Canadian evaluation community.

¹ Statement adopted by CES Board 17.11.23 with subsequent approval from the UNDRIP Working Group 04.12.23.

The course and other products will be initially developed and tested in English. CES will translate the products into French once development and testing is completed.

The work will be supervised by the CES Director of Professional Learning (board position) and the Course Development Subcommittee of the Ethical Guidance Working Group (EGWG), chaired by the CES Vice-President. The Course Development Subcommittee is composed of evaluation volunteers who will review all materials.

The term for this work is up to 8 months. The consultant(s) is expected to work remotely.

2.1 Detailed Tasks, Schedule, and Deliverables

The consultant will develop the English version of the course provisionally titled, *Ethical Practice for Canadian Evaluators*. This work will involve:

1. Becoming familiar with the CES e-Institute course development guidelines as well as Program Evaluation Standards and Competencies for Canadian Evaluators (to be completed by Week 1 of contract).
2. Reviewing the draft course proposal including its structure and learning objectives (see Appendix A) and key source materials:
 - a. Updated Ethical Guidance document
 - b. Consultation / survey data on ethical challenges most commonly faced by Canadian evaluators.(Week 2 of contract).
3. Preparing an Instructional Design Plan in consultation with a CES Instructional Designer for review and approval by the EGWG Course Development Subcommittee, the Curriculum Advisory Committee, the Director of Professional Learning, and others as required. (Week 2 of contract.)
4. Preparing a preliminary draft of the first course module for review and approval by the EGWG, Director of Professional Learning, and others as required. This review will set parameters for all subsequent modules. (Week 5). Written feedback will be provided within one week of submission and is to be integrated before the subsequent submission.
5. Preparing first drafts of each remaining course module for review by the CES Instructional Designer, EGWG, e-Institute Director, and Subject Matter Experts: one module every three weeks (Weeks 6 through 18.) Each module will include appropriate (grounded in authentic examples of ethical challenges faced by Canadian evaluators) reflective practice tools, exercises and activities.
6. Reviewing comments of expert reviewers and revising the course based on feedback, to be provided one week after submission. (Two weeks after feedback provided, tentatively weeks 24-25 of contract.)
7. Reviewing comments of pilot testers and revising the entire course as required. (Two weeks after feedback provided, tentatively weeks 30-36 of contract.)

8. Contributing illustrative slides drawn from each of the course modules to a webinar promoting the re-launched refreshed guidance and tools as a marketing support for the course (to be provided with each module submitted).
9. Reviewing comments from the final quality assurance review and revising course as required. (Two weeks after feedback provided, tentatively weeks 28-38 of contract.)

In developing the course modules, webinar contributions, and the reflective practice tools, exercises and activities, the consultant(s) will be provided with guidance by the e-Institute.

3.0 Compensation

Up to \$18,000 including GST is available to complete this work.

4.0 Submission of Proposals

An electronic copy of your proposal must be submitted to operations@evaluationcanada.ca by 5 pm EDT on February 8, 2024. Acceptable formats for the electronic version are *pdf, *doc or *docx.

4.1 Length

Responses should not exceed 10 pages, double-spaced with 1-inch margins and 12-point font (excluding any references and appendices).

4.2 Eligibility of Bidders

This request for proposals is open to all bidders who meet the bid requirements indicated in this document. This work should be led by an individual knowledgeable about a) evaluation ethics and the teaching of evaluation ethics, and b) instructional design for online professional education or can involve a partnership or collaboration between two or more consultants who bring expertise in both areas.

Qualifications:

1. Knowledge and experience in evaluation;
2. Knowledge and experience of evaluation ethics - theory, concepts and/or practical application; and
3. Knowledge and experience in online course development / instructional design for professionals that prompts participant reflection and openness to share ideas.

Although not required, preference may be given to candidates with:

- A CES membership;

- Knowledge of the Canadian evaluation field and context;
- Knowledge and experience with evaluation practices consistent with the CES Core Professional Values;
- A Credentialed Evaluator designation.

4.3 Proposal Content

Each response must demonstrate the bidder's:

1. Knowledge, training and/or experience in the areas listed in Section 4.3;
2. Approach to online course development, teaching, and learning in this area;
3. Approach to working with committees including ethical advisors, academics, etc; and
4. Ability to work remotely under minimal supervision.

In addition, the proposal should include:

1. A work plan showing the major tasks, level of effort, and timeframe;
2. A budget, broken down by task effort, personnel contribution, and deliverables;
3. The names and contact information for two references providing information on bidders' course development experience. As part of CES due diligence, shortlisted Bidders' references may be contacted to confirm experience and quality of work;
4. Evaluations of courses previously developed or taught, if available. This information can be placed in an appendix.

5.0 Selection Criteria

5.1 Mandatory Requirements

Each response will be assessed based on the criteria indicated in Table 1 (see section 5.3, below) provided that the following criteria are met:

1. Proposal received by 5 pm EDT February 8, 2024.
2. Length and format of proposal as per Section 4 of this RFP.
3. Proposal states that the consultant(s) can complete initial course development within eight months.
4. Proposal states that course and product development will be led by a subject matter expert(s) in evaluation ethics and design of on-line professional learning.

5.2 Evaluation of Responses

A minimum of three CES members (including the Director of Professional Learning and members of the Ethics Guidance Working Group) will form a response review committee to evaluate all complete responses. The responses will be scored and ranked. CES may request an online interview from select bidders. The CES reserves the right to make an award based directly on the responses submitted or to negotiate further with one or more bidders.

5.3 Response Scoring

Each response will be assessed based on the criteria indicated in Table 1 below, provided the mandatory requirements (section 5.1) are met:

Table 1. Proposal Scoring

Criteria	Points
Knowledge and experience of evaluation ethics - theory, concepts and/or practical application	25
Knowledge and experience in online course development / instructional design experience prompting reflection and openness to share ideas	25
Knowledge and experience in the field of evaluation practice in Canada, including application of CES core values	15
Proposed approach to course development, teaching and learning	15
Work plan including level of effort and budget	15
Clarity, organization, completeness and professional appearance of the written response.	5
Total Possible Points	100

6.0 General Conditions

6.1 Right to Amend Request for Proposal

The CES reserves the right to amend or supplement the Request for Proposals, giving equal information and cooperation by way of issued addendum to all potential bidders through the CES website (www.evaluationcanada.ca).

6.2 Bidder Incurred Costs

All costs incurred in the preparation and presentation of responses in any way whatsoever shall be wholly absorbed by the bidder(s).

6.3 Indemnity

The bidder(s) will indemnify and save harmless the CES from and against all claims, demands, losses, damages, costs, and expenses made against or incurred, suffered, sustained, done or omitted by the CES at any time before or following termination of the agreement.

6.4 Acceptance of Responses

The CES is not bound to accept any response of those submitted. Responses will be assessed on the basis of the criteria specified in Section 5.0 above.

6.5 Designated CES Liaison

The Designated CES Liaison for this contract is the Vice-President and Chair of the Ethical Guidance Working Group, Beth Snow.

6.6 Payment terms

Payment will be made upon receipt of invoices for approved deliverables, within 30 days of receipt. Bidders should propose a payment schedule in their proposals.

6.7 Ownership rights

All materials created through this contract shall be the property of the CES and shall not be published or released without the written consent of the CES. If the consultant will be adapting existing intellectual property (IP), the CES and the consultant will negotiate a shared IP agreement.

6.8 Conditions for termination of contract

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

6.9 Insurance requirements

Bidders are required to hold adequate professional liability insurance and so state in their proposals.

6.10 Signatures and witnesses of Contracting Parties

For the Canadian Evaluation Society	Witness	Date
For the Bidder	Witness	Date

7.0 Questions and Inquiries

Should prospective bidders have any questions regarding this Request for Proposals, they may contact the Director of Professional Learning in writing prior to 12 Noon EDT on January 23, 2024, at professionallearning@evaluationcanada.ca. In the interest of equality of access to information, questions received prior to this deadline will be published with written responses on the CES website (www.evaluationcanada.ca) by 5 pm EDT on January 30, 2024 .

Appendix A – Draft Course Outline

CES e-Institute Course Proposal Form

(Last revised May 10, 2023)

Proposed Course Name:	Ethical Practice for Canadian Evaluators
Type of Course:	<input type="checkbox"/> Self-paced <input type="checkbox"/> Facilitated online <input type="checkbox"/> Blended (online and in-person) <input type="checkbox"/> Micro course (about 4 hours to complete)
Anticipated Course Duration: Expected # of hours for the average learner to complete the course	Four hours
Language of Initial Development:	<input type="checkbox"/> English
Context and Scope	<p>Drivers: The need for this course is driven by (choose all that apply):</p> <input type="checkbox"/> CES Curriculum Development Strategy <input type="checkbox"/> A gap in current course offerings <input type="checkbox"/> Developments in the profession <input type="checkbox"/> Issues requiring action <input type="checkbox"/> Other please specify: Supports implementation strategy for CES renewed Guidance for Ethical Evaluation Practice.
	<p>Competencies addressed: The objectives of this course are aligned with the following CES Competencies for Canadian Evaluators:</p> <p>1.0. Reflective Practice competencies focus on the evaluator’s knowledge of evaluation theory and practice; application of evaluation standards, guidelines, and ethics; and awareness of self, including reflection on one’s practice and the need for continuous learning and professional growth.</p> <p>2.0. Technical Practice competencies focus on the specialized aspects of evaluation, such as design, data collection, analysis, interpretation, and reporting.</p> <p>3.0. Situational Practice competencies focus on understanding, analyzing, and attending to the many circumstances that make every evaluation unique, including culture, stakeholders, and context.</p> <p>4.0. Management Practice competencies focus on applying sound project management skills throughout the evaluation project.</p> <p>5.0. Interpersonal Practice competencies focus on the social and personal skills required to communicate and interact effectively with all stakeholders.</p>

	Specifically, Competency 1.3 <u>and</u> the integration of values-based ethical questioning into all other competency domains.
Target Audience(s)	<p>Audience: All CES members</p> <ul style="list-style-type: none"> ● Please see the learning objectives: the course will be a first hands-on opportunity for CES members to become familiar with and practise applying the revised ethics approach. It will complement other implementation support and tools developed for chapter-level professional development. ● Audience size: all CES members (free version); open for a fee to non-members: total 1500 English, 400 French, minus the CE component of the membership (who are included in Audience 2).
Learning Objectives	<p>At the end of this course, learners will be able to:</p> <ul style="list-style-type: none"> ● Explain the CES core professional values that underpin ethical evaluation practice in Canada. ● Describe how the core professional values are embedded in all aspects of evaluation practice. ● Purposely and thoughtfully apply values-based questioning skills in all aspects of evaluation practice. ● Purposefully and thoughtfully apply skills in identifying and considering all values at play. <p>The course will not address the following: Decision-making about individual cases of unethical or incompetent practice or evaluations that fail to meet standards.</p>
Course Topics	<p>To meet the learning objectives, course contents will include:</p> <ol style="list-style-type: none"> 1. Ethics as a pillar of CES membership and of the field in general; its relationship to competencies and standards. 2. CES core professional values: meaning, origins, and similarities and differences to other values statements and stances. 3. Other values at play: strategies for identifying them, acknowledging them, and confronting them constructively. 4. Questions for CES-values-based reflection, demonstrating applications in all five competency domains. 5. Analysis of case scenarios based on survey and consultation findings on ethical dilemmas most commonly reported by Canadian evaluators and reflection on dilemmas not voiced or acknowledged. <p>Other tools, resources and supports will be identified. A post-course knowledge assessment will be included; passing will be required for a certificate of completion.</p>
Source Materials	<p>This course will be developed based on:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Documentary sources (e.g., books, articles, reports). The principal documentary sources will be the updated Guidance, and its accompanying consultation documents. This will be complemented by review of relevant material from VOPES and evaluation sources. <input type="checkbox"/> Existing courses, webinars, or presentations <input type="checkbox"/> Subject matter experts' knowledge (identify and describe expertise) Subject matter expert(s) will be engaged to develop the course content. They will be expected to be familiar with the general literature on professional ethics as

	<p>well as the major publications on ethics in evaluation, in Canadian and other contexts; to have given previous teaching and/or training in evaluation ethics, and may have conducted research in the field.</p> <p><input type="checkbox"/> Other, please specify: Existing survey and consultation data on ethical challenges most commonly faced by Canadian evaluators.</p>
Course Developer	<p>Name: Click or tap here to enter text. e-mail: Click or tap here to enter text. Please attach a recent CV.</p>