



Request for Proposal

Identification of CES needs for collecting and using identity and demographic data

January 2024

Proposals are due to the CES by **11:59 p.m. Pacific Time on February 9, 2024**. Bidders are asked to submit an email indicating their intent to submit a proposal by **11:59 p.m. Pacific Time on January 17, 2024** to the CES President. See Section 3.1 for instructions. Questions on this RFP will be answered during a Q&A web conference during the week of **January 22, 2024**. Please see Section 6.0 for further detail.

Table of Contents

● 1.0 Background	3
● 2.0 Project Overview	4
○ 2.1 Purpose and Objectives	4
○ 2.2 Scope of Work and Deliverables	5
● 3.0 Proposals	6
○ 3.1 Submission	6
○ 3.2 Length	6
○ 3.3 Identification of Bidders	6
○ 3.4 Eligibility of Bidders	6
○ 3.5 Proposal Content	7
● 4.0 Selection Criteria	8
○ 4.1 Mandatory Requirements	8
○ 4.2 Evaluation of Proposals	8
○ 4.3 Proposal Scoring	8
● 5.0 General Conditions	10
○ 5.1 Right to Amend RFP	10
○ 5.2 Bidder-Incurred Costs	10
○ 5.3 Indemnity	10
○ 5.4 Acceptance of Proposals	10
○ 5.5 Maximum Funding	10
○ 5.6 Ownership	11
○ 5.7 Termination of Contract	11
○ 5.8 Insurance	11
● 6.0 Questions and Inquiries	12

● **1.0 Background**

For over 40 years, the Canadian Evaluation Society (CES) has helped evaluation professionals build and advance their careers, providing a wide range of professional development opportunities and expert resources. Through our national operations and network of Chapters, members and partners, we build awareness of evaluation, promote the development of evaluation theory and practice, advocate for the use of quality evaluation, and lead the professionalization of our profession.

CES plans to improve our collection of identity and demographic data in order to be more systematic in learning about the diversity of our members. We want to examine if CES's activities are reaching certain demographic groups or types of members more than others, and if there are groups of evaluators we are not reaching sufficiently. That is, are there groups of evaluators who are missing from our membership and not participating equitably in our activities and services, notably equity-deserving groups?

Standardized collection of identity and demographic data will position the CES to analyze intersections of socio-demographic identities (e.g., Indigeneity, ethnicity, ability, race, language, age, gender identity, newcomer status) to better understand who is represented (or not) within our membership. We will further be able to learn how identities may differ across evaluation sectors (e.g., consulting, government, academia, NGOs), and areas of practice (education, environment, health, etc.).

We will use this identity and demographic data to track diversity-related changes in participation in such areas as registration (CES members, professional development participants, webinar participants, mentorship participants, conference presenters and delegates), as well as the Credentialed Evaluator designation, CES Fellows, and CES award-winners.

Overall, this data will help CES to: (1) support decisions about how to best reach underrepresented groups, (2) better serve the interests of CES members and other evaluators who take part in CES events (such as professional development), (3) optimize experiences of inclusion for all evaluators who connect with CES.

The main audience for this project is CES National. We intend to apply what we learn to not only better understand our present membership, but (more importantly) to benefit evaluators whom we have not been serving or including well.

The timeframe of this project is **from contract signature date to October 31, 2024.**

- **2.0 Project Overview**

- **2.1 Purpose and Objectives**

The purpose of this RFP is to invite proposals to:

- (1) Identify (a) CES's needs for collecting and using identity and demographic data, and (b) identity and demographic questions and response options;
- (2) Review findings from (1) with CES groups who will be using the resulting data, and with CES members, with particular focus on those who identify with equity-deserving groups impacted by exclusion or inadequate inclusion.

Relevant documents such as promising practices and possible identity and demographic questions will be made available as a starting point to the consultant, to facilitate their work. The following tasks are to be completed under this consultancy:

1) Identify needs for and potential uses of identity and demographic data :

- a. Review relevant CES documents/webpages (e.g., CES [Guiding Principles](#), [Ethics Guidance](#), [Commitment to Reconciliation](#)).
- b. Consult with CES National Board, standing committees, provincial/territorial Chapters, and working groups (WGs) – such as United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP) WG , Conference in a Box WG, Mentoring Initiative WG and Ethical Guidelines WG — as well as with specific CES members with experience in how to be more inclusive of equity-deserving groups who have been impacted by exclusion or inadequate inclusion.

2) Identify promising questions, response options, and related data collection and analysis approaches that align with identity and demographic data needs and uses (based on learning from Step 1):

- a. Conduct an environmental scan of promising practices used by: (i.) other professional associations, and (ii.) organizations or individuals whose lived experience of inequity and exclusion informs their review of identity and demographic data from perspectives of decolonization, anti-racism, and other anti-oppressive lenses.
- b. Review academic and/or grey (online) literature on promising practices, with focus on decolonization, anti-racism, and other anti-oppressive lenses – particularly by authors whose work is grounded in lived experience of oppression/marginalization and demonstrated understanding of intersectionality.

3) Review findings from Steps 1 and 2 with the CES membership to identify concerns, perceived barriers to implementation, and suggestions. Priority audiences for this review, and primary users of the resulting data, will be the National Board and the standing committees and working groups, and provincial/territorial chapters. It will be important to make sure that the data to be collected meets their information needs, and that no data will be collected that does not meet a specific need or

CES Identity and Demographic Data Project RFP

purpose. As well, CES will encourage participation from members from equity-deserving groups with experiences of feeling excluded or not fully included in CES. Sources of data could include online discussion forums as well as a private portal through which members could provide individual feedback. With their permission, members who participate in this process will be acknowledged for their contribution in the final report, out of respect for their knowledge/experience and their time.

4) Final deliverable: Report summarizing findings of Steps 1-3, and providing recommendations regarding possible questions and response options based on these findings.

○ **2.2 Scope of Work and Deliverables**

Table 1 summarizes the tasks and deliverables to be completed by the consultant(s).

Table 1. Tasks and Deliverables

Steps	Tasks	Deliverables	Due Dates
1	Develop the project workplan	Project workplan	April 2024
2.	Review relevant CES documents/webpages	Summary of identity data needs and uses	April 2024
3.	Engage CES members in consultations to identity data needs and potential uses	Synthesis of data needs and potential uses, based on consultations	June 2024
4.	Identify promising questions and response options that respond to CES needs and uses as identified in 2. above	Draft CES identity and demographic measures in English and French	August 2024
5.	Review findings from Steps 2-4 with interested CES members - particularly the CES national board, standing committees and working groups, provincial/territorial chapters, and members who have had experiences of exclusion/inadequate exclusion.	Presentation to CES Equity, Diversity and Inclusion & Environmental Sustainability (EDI&ES) Standing Committee of results of this review including (if applicable) recommendations for modifications to the draft questions and response options	September 2024
6.	Prepare and submit final report	Final CES Identity and Demographic Data report, combining finalized versions of the deliverables from Steps 1-4 above	October 2024 (Deliverable date is aligned with CES Conference C2025 planning needs)

- **3.0 Proposals**

- **3.1 Submission**

Potential bidders are to submit an email indicating their intent to submit a proposal by **11:59 p.m. Pacific Time on January 17, 2024** to the CES President via secretariat@evaluationcanada.ca.

Bidders must submit an electronic copy of the proposal to the CES President via secretariat@evaluationcanada.ca by **11:59 p.m. Pacific Time on February 9, 2024**. Acceptable formats for the electronic version are *.pdf, *.doc or *.docx.

- **3.2 Length**

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

- **3.3 Identification of Bidders**

If a team submits a bid, one member must be identified as the principal bidder on behalf of the team. All further communication with CES will be with this member. All team members must be clearly identified in the proposal. A short Curriculum Vitae (CV) must be included for each team member. Proposals must identify the qualifications, competencies, and experience of each team member, related to the scope of this project.

Proposals must include names and contact information of three references who are able to comment on the principal bidder's relevant knowledge and experience must be provided. Please note that CES may contact some, none, or all references as it determines appropriate.

- **3.4 Eligibility of Bidders**

This RFP is open to all bidders who meet the bid requirements indicated in this document – with the following exception involving a company in which a CES Board member or Board member's spouse, partner, child, or grandchild is involved. In this case, an employee of the company is eligible to respond to bids if the Board member: (1) is not involved in any phase of the contracting process, (2) does not use their position to influence a decision in the awarding of the contract, and (3) declares the conflict of interest to the Board prior to the submission of a proposal.

CES Identity and Demographic Data Project RFP

○ 3.5 Proposal Content

Each proposal must address the bidder's:

- Knowledge of the CES and of the current CES strategic plan
- Experience with the following content areas:
 - assessing identity and demographic data needs in the context of organizations working to change policies and practices, in order to become more inclusive and equitable
 - identifying promising questions and response options used by relevant organizations to collect identity and demographic data
 - facilitating consultations and then synthesizing and confirming findings
- Proposed approach and workplan to address the requirements of this project – including level of effort to do the work (such as how many consultation meetings/interviews the consultants propose would be needed to identify the data need and potential users)
- Proposed budget for this project
- Extent to which the project team's members are members of equity-deserving groups.
- Ability to review documents and conduct consultations in English and French for at least one team member (because CES is a bilingual organization).

Credentialed Evaluator (CE) status of one team member will be considered an asset, but not a requirement.

- **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 **11:59 p.m. Pacific Time on February 9, 2024.**
- Price is at or below the amount(s) shown in Section 5.5 (exclusive of taxes but inclusive of all expenses). Inclusion of additional items, separately priced, are acceptable should the bidder wish to propose one or more ideas beyond the scope of this RFP for consideration. Travel is not expected as part of this contract.
- English is the primary language for this contract, although some document reviews and/or consultations may be in French. In addition, the proposed identity and demographic questions and response option must be provided in English and French. Any development of original (not pre-existing) questions will be done simultaneously in both languages. For pre-existing questions identified through the review process that are a fit for this project but are English-only or French-only, the cost of their translation needs to be included within the maximum funding for this project.
- The length and format of proposal conforms to Section 3.2 of this RFP.
- A team leader, and additional team members, must be 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 EDI&ES Standing Committee will form a proposal review committee to evaluate all complete proposals. The review committee will also include a member each from the CES's United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP) Working Group, and the CES Ethics Working Group. The proposals will be scored and ranked, independent of the lump sum price. The CES reserves the right to make an award based directly on the proposals submitted, or to negotiate further with one or more bidders.

- **4.3 Proposal Scoring**

Each proposal will be assessed based on the criteria in Table 2, if the mandatory requirements in Section 4.1 are met. Proposals must meet a minimum scoring of 70 points to be screened in for assessment and

CES Identity and Demographic Data Project RFP

selection. In the case of proposals with equivalent scores, preference will be given to those that include at least one team member from an equity-deserving group, if identified as such in the proposal.

Table 2. Proposal Scoring

Rated Criteria	Points
Knowledge of the CES and of the current CES strategic plan ¹	10
Recent ² project team experience (within last 3 years) with equity, diversity, and inclusion work in the context of evaluation or research, in the following areas: ³ <ul style="list-style-type: none"> - identifying identity and demographic data needs in the context of equity, diversity, and inclusion (10 points) - identifying types of measures used by a variety of organizations to collect identity and demographic data (10 points) - recent project team experience facilitating consultations and then synthesizing findings and reviewing them to gather and integrate feedback (10 points) 	30
Proposed approach and, with attention to how identity-related lived and professional experiences inform the team's approach	35
Proposed work plan (including tasks, deliverables, dates) to fulfill the requirements of this project)	15
Proposed budget aligned with the approach and workplan <ul style="list-style-type: none"> - Project budget cannot exceed the maximum funding for this project, as per section 5.5 	10
Total Possible Points	100
Mandatory Criteria	
Members of one or more equity-deserving groups that have historically been marginalized represent at least half of the project team. Alternatively, a strong letter of recommendation from a previous client or evaluation participant who is a member of an equity-deserving group will be accepted.	Criterion met/Criterion not met
Proficiency in French and English by at least one team member	Criterion met/Criterion not met

¹ https://evaluationcanada.ca/client_assets/PDFs/CES%20Strategic%20Plan%20EN.pdf

² Recent = in the last 3 years

³ The same project experience can be used for more than one of the criteria below.

- **5.0 General Conditions**

- **5.1 Right to Amend RFP**

The CES reserves the right to amend or supplement the RFP, sharing additional information equally to all potential bidders through the CES website (www.evaluationcanada.ca). Bidders who have indicated their intent to bid will receive email notification of any amendment or supplement. Please see Section 3.1 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 shall be wholly absorbed by the bidder(s).

- **5.3 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.

- **5.4 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.

- **5.5 Maximum Funding**

The funding for this project is limited to the following amount(s) in Canadian funds, exclusive of applicable taxes but inclusive of all expenses: **\$25,000**
Bids over \$25,000 will be considered non-compliant. The payment schedule is shown in Table 3.

CES Identity and Demographic Data Project RFP

Table 3. Payment Schedule

Invoice	Deliverables, in relation to Table 1
20%	- Project workplan
50%	- Summary of identity data needs and uses - Draft CES identity and demographic questions and response options in English and French
30%	- Presentation to EDI&ES Standing Committee of results of review - Final CES Identity and Demographic Data report

○ **5.6 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.

○ **5.7 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.

○ **5.8 Insurance**

It is recommended (though not required for this project) that the contractor shall 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 Questions and Inquiries**

A web conference call will be held for potential bidders who have questions about this RFP, during the **week of January 22, 2024**. Potential bidders who cannot attend will be invited to submit their questions in advance. A recording of the web conference will be made available to all potential bidders who have indicated their intent to submit a proposal, as per section 3.1.