



**REQUEST FOR PROPOSALS  
LEAD THE SHIFT PROGRAM FACILITATOR**

Date Issued: August 26, 2022

Submission Deadline: 5:00 PM, Friday, September 23, 2022

## **About The Greater Charlottetown Area Chamber of Commerce**

The Greater Charlottetown Area Chamber of Commerce (“the Chamber”) is a non-partisan, not-for-profit membership-based organization. We are proud to be Prince Edward Island’s largest business advocacy organization committed to supporting and connecting our business members. Today, our diverse network of businesses represents almost every industry sector and business profession. With more than 1,100 business members, and their more than 20,000+ employees, our united voice draws attention to local business needs.

## **About Lead the Shift**

Lead the Shift is an employer training program delivered by the Chamber and PEI Connectors. The goal of the program is to provide employers with the education, skills, and tools necessary to develop and implement equity, diversity and inclusion (EDI) strategies and policies at their workplaces. By working with employers to create safe, welcoming and inclusive workplaces, immigrants and marginalized groups will find employment that is aligned with their post-secondary education and professional experiences and realize their full career potential in PEI. It also helps to address labour market shortages and contribute to better immigrant retention rates for the province.

The program is funded by Employment and Social Development Canada through the PEI Department of Economic Growth, Tourism and Culture, and delivered by the Chamber.

## **PART 1 – INVITATION AND SUBMISSION INSTRUCTIONS**

### **1.1 Invitation to organizations and individuals**

This Request for Proposals (the “RFP”) is an invitation by the Chamber to organizations and individuals (“proponents”) to submit proposals for Lead the Shift program facilitator services for Cohort #1. The successful proponent will work with the Chamber to develop and deliver Lead the Shift training – this includes:

- Conducting EDI assessments for participant organizations
- Developing the training curriculum: creating and scripting a workshop plan with activities, main concept presentation and discussions
- Conducting the training sessions: facilitating the workshops, explaining key concepts and leading discussions
- Creating a list of resources for participants

The work requires regular contact with the Chamber program’s staff, and efficient time management skills to ensure all program milestones are achieved as planned.

### **1.2 RFP contact**

For the purposes of this contracting process, all correspondence, including requests for additional information, inquiries, or clarification, are to be addressed to the RFP contact:

- Karla Yopez, Program Officer & Special Projects Manager
- [kyopez@charlottetownchamber.com](mailto:kyopez@charlottetownchamber.com)

Proponents and their representatives are not permitted to contact any employees, board members or other Chamber representatives other than the RFP contact concerning this RFP. Any request for clarification and inquiries concerning this RFP must be submitted in writing via email one week before the deadline. Failure to adhere to this rule may result in disqualification of the proponent and the rejection of the proponent’s proposal.

### 1.3 Type of contract for deliverables

The successful proponent will be required to enter into an agreement with the Chamber for the provision of the services outlined. The initial deliverable for the contract will be the overall training for Cohort #1, with the possibility of renewal for five additional cohorts by March 31, 2024, subject to review after each cohort.

### 1.4 RFP Timetable

Issue date of RFP	August 23, 2022
Register interest in RFP	Anytime prior to the submission deadline
Deadline for questions	September 16, 2022
Submission deadline	September 23, 2022
Shortlist of proponents	September 26, 2022
Presentation/interview with shortlisted proponents (if required)	September 29, 2022
Anticipated awarding of contract	October 3, 2022

The RFP timetable is tentative only and may be changed by the Chamber at any time.

### 1.5 Registering interest in the RFP

Proponents must register their interest in responding to the RFP prior to the submission deadline. This is to ensure that the Chamber can track expected proposals and correspond with proponents on any amendments or updates to the RFP.

### 1.6 Submission of proposals

Proposals must be submitted electronically by email in PDF form. In the interest of simplifying the RFP process, proponents are asked to limit their written response to a maximum of eight (8) pages, excluding the cover page.

**Please send RFP responses to [kvepez@charlottetownchamber.com](mailto:kvepez@charlottetownchamber.com) with the subject line “LTS Facilitator RFP Response.”**

Proponents may submit amendments to their proposal electronically up until the submission deadline. Any amendments received after the submission deadline will not be accepted.

## Part 2 - RFP PARTICULARS

The Chamber seeks to secure the services of an equity, diversity, and inclusion (EDI) facilitator to provide the following services:

- Conduct EDI organizational assessments of the participants' workplaces in order to establish a baseline prior to the start of Lead the Shift training (25 organizations for Cohort #1)
- Develop and deliver the Lead the Shift training curriculum (25 organizations for Cohort #1; each organization may enroll one or two employees in the same cohort)
- Recommend strategies and best practices for the development and implementation of EDI policies within participant organizations (25 organizations for Cohort #1)
- Facilitate two in-person workshops with community stakeholders to help participants understand the realities faced by marginalized groups in the workplace, and the application EDI strategies.
- Develop a list of materials and resources to help participants understand key EDI concepts

## **PART 3 – EVALUATION OF PROPOSALS**

### **3.1 Mandatory requirements**

The following are the mandatory minimum requirements:

- The successful proponent must be able to demonstrate that they have EDI knowledge, education, and experience.
- The successful proponent must be able to demonstrate that they have strong communication skills and are able to handle sensitive topics.

Note that proponents with lived experience will be given priority.

### **3.2 Evaluation criteria**

Proposals that have met the mandatory requirements will be evaluated based on the following criteria:

<b>Evaluation Criteria</b>	<b>Evaluation Index</b>
Responsiveness to scope of work <ul style="list-style-type: none"><li>• Content</li><li>• Capacity/availability</li><li>• Demonstrated EDI expertise</li><li>• Familiarity with workplace policy development, implementation, and evaluation</li></ul>	40%
Workshop facilitation skills	30%
Cost effectiveness	30%

## **PART 4 – VENDOR RESPONSE**

Proponents must adhere to the format outlined below when responding to this RFP. Responses should not exceed eight (8) pages, excluding cover page and appendices.

### **4.1 Proponent background and experience**

- Include company information, contact information, backgrounder
- Include the proponent's education and experience specifically related to EDI
- Include the proponent's experience with workshop/curriculum development and delivery, EDI policy development and implementation, and organizational behaviour

### **4.2 Methodology and approach**

With the proponent's knowledge of Lead the Shift, describe the approach they would take in developing:

- The methodology for conducting organizational assessments
- The training agenda, with content, concepts, and activities
- The resources and support material for participants

### **4.3 Vendor references and sample of work**

Provide two references and a sample of work that best demonstrates the proponent's experience.

- Two references, including contact information
- One sample of work that best demonstrates experience in developing and delivering EDI training to employers

#### 4.4 Financial proposal

Provide your proposed fee with detailed information about the expenses will be covered by the fee and any variable expenses. Please feel free to offer a phased proposal or menu of options and include a cost breakdown for the following components:

Deliverable	Cost		Timeline (desired)
	Fixed	Variable	
1. Curriculum development and content production			October 2022
2. EDI introduction webinar (1 hour)			October 2022
3. Organizational assessments (25 participants) a. Assess participant organizations' EDI work to establish a baseline prior to Lead the Shift training. Assessments can include but are not limited to practices, processes, system supports, organizational culture, KPIs, governance. <sub>1</sub> Participant= organization; each organization may designate up to two people to participate in Lead the Shift in the same cohort			November 2022
4. Online education (15 hours) a. Orientation session (3 hours) b. Homework (self-learning) (3 hours) c. Interactive online training (9 hours)			December 2022 January 2023
5. In-person community stakeholder discussion (8-12 hours) a. Coordinate and moderate discussions			January 2023

Thank you for your interest in this RFP. All proponents who submit a proposal will be informed of the outcome.