

CALL FOR PROPOSALS: EDI CONSULTANT

1.0 Purpose

The Atmospheric Fund (TAF) is seeking an equity, diversity, and inclusion (EDI) expert (or expert team) to assist TAF with developing, refining, and reporting on EDI goals/targets, as well as advising TAF on the role of goals and targets in furthering our EDI commitments.

Our budget for this project is \$7,500. Please note that this amount is only an approximation and does not necessarily reflect the total amount that will be paid to any vendor. This amount is for information only.

1.1 Background Information

The Atmospheric Fund (TAF) is a regional climate agency that collaborates with stakeholders in the private, public, and non-profit sectors across the Greater Toronto and Hamilton Area (GTHA). Since 1991, TAF has been focused on supporting and implementing concepts that reduce carbon emissions as well as improve people's health, create new green jobs, boost urban resiliency, and contribute to a fair society. TAF is focused on enabling the acceleration and scale-up of low-carbon solutions with the goal of making the GTHA carbon neutral by 2050.

TAF established an EDI Working Group in 2019. The working group currently consists of 6 members, including one member of the Senior Management Team. The working group has created a number of initiatives to date, including a bi-monthly lunch and learn program, as well as becoming a signatory of NRCan's Equal by 30 campaign. You can find out more about the working group [here](#). The Successful Proponent is expected to work closely with the working group throughout the project; the working group members are eager to learn in a collaborative.

2.0 Scope of Work

While TAF has specific, short-term EDI objectives that this work is intended to help support, we recognize that, given the developmental nature of this work, other needs or opportunities might arise once we get started. The Objectives and Deliverables outlined in this section and the Price Detail Form provided in Appendix B are structured to reflect both a set of specific, fixed deliverables, as well as a set of advisory services (billed at an hourly rate), additional to any work needed to complete the Deliverables in Objectives 1 and 2, that can be accessed at TAF's discretion.

Objective 1: Understanding Role of Goals and Targets

Guide TAF in understanding the role of goals and targets in furthering our EDI commitments (both existing and new). This will include organizing a facilitated discussion with the working group to surface insights and form recommendations for further action. Post-discussion, the Successful Proponent will provide a short, written memorandum summarizing these recommendations based on their expertise and discussions with the working group.

This task should provide the working group with the knowledge and understanding to advise the larger organization on how we ensure continuous improvement upon our EDI commitments in the future.

Expected Deliverables

- Deliverable 1.1: Memorandum summarizing recommendations for TAF to pursue in setting goals and targets to further the organization's EDI commitments.

Objective 2: Support Development of TAF's 2021 Demographic Survey Report and 2022 Demographic Survey

The Successful Proponent will work with the working group to develop the 2021 Demographic Survey Report and the coming 2022 Demographic Survey through providing feedback, guidance, and advice on best practices for this and future work, with the goal of guiding TAF in establishing a process for regularly reporting on EDI within the organization. TAF will provide the consultant with access to the existing survey questions and results in a digital format.

The initial stages of this work will include reviewing the questions and results of TAF's 2021 Demographic Survey with the working group, providing feedback and recommendations for future surveys, and advising on the development of the report summarizing those survey results. The Successful Proponent will not be expected to draft the 2021 Demographic Survey Report; however, they will be expected to provide an outline for the report. They will also be expected to review an early draft of the report (to be completed by TAF) and provide feedback.

The findings from the above work will be used to inform the 2022 Demographic Survey. The Successful Proponent will work with the working group to draft a set of questions to be used in future surveys. This will include providing a list of recommended questions for TAF's consideration and detailing the rationale for any changes/additions.

Expected Deliverables

- Deliverable 2.1: Report outline and initial recommendations for TAF's 2021 Demographic Survey Report.
- Deliverable 2.2: Review of and feedback on an early draft of TAF's 2021 Demographic Survey Report.
- Deliverable 2.3: Draft questions, with associated rationale or context, for TAF's 2022 Demographic Survey (in collaboration with TAF's EDI Working Group).

Objective 3: Advise TAF on Additional EDI-Related Work

Through the completion of the work outlined in Objectives 1 and 2 above, TAF may identify future needs or opportunities that would benefit from additional engagement with the Successful Proponent. These advisory services would be billed at a pre-determined hourly rate (see Appendix B) and are an optional component of this Scope of Work, to be accessed at TAF's discretion in consultation with the Successful Proponent.

Additional work may include, but is not limited to:

- Additional review or feedback on TAF’s Demographic Survey or Demographic Survey report.
- Feedback on other EDI working documents, including draft goals and targets meant for implementation.
- Meetings with the EDI Working Group on other EDI-related topics or initiatives.

3.0 Proposal Evaluation and Selection Process

3.1 Selection Committee

All Proposals will be evaluated through a comprehensive review and analysis by a Selection Committee, which will include members from TAF.

The Selection Committee may at its sole discretion retain additional committee members or advisors.

The aim of the Selection Committee will be to select one (1) Proposal which in its opinion meet(s) TAF’s requirements under this RFP and provide(s) the best overall value to TAF. The Proposal selected, if any, will not necessarily be the one offering the lowest fees or cost. Pricing is only one of the components that will be used to determine the best overall value for TAF.

3.2 Selection Criteria

Criteria	Percentage
Approach to work	30%
Experience and credentials	30%
Cost	40%

3.3 Selection Process

The Selection Committee will score the Proposals using the evaluation table in Appendix A.

3.4 Schedule of Events

<i>Milestone</i>	<i>Scheduled Date</i>
RFP issue date	July 5, 2022
Deadline for questions	July 19, 2022
Proposals due	July 26, 2022
Date evaluation expected to be complete	August 5, 2022
Expected approval and award date	August 12, 2022
Expected contract start date	August 15, 2022
Expected contract end date	November 30, 2022

This schedule is subject to change and appropriate written notice of any changes will be provided where feasible.

3.5 Clarifications

As part of the evaluation process, the Selection Committee may make requests for further information with respect to the content of any Proposal in order to clarify its understanding of the Proponent's response. The clarification process shall not be used to obtain required information that was not submitted at time of close or to promote a particular Proponent. The Selection Committee may request this further information from one or more Proponents and not from others.

3.6 Interviews

A Proponent whose written Proposal has met or exceeded the minimum score for the technical portion of the Proposal or has received a high ranking may be invited to an interview with the Selection Committee, the results of which will be used by the Selection Committee as a mechanism to revisit, revise, confirm and finalize the score and select the recommended Proponent(s). TAF reserves the right to interview up to a maximum of three (3) top ranked Proponents. The Selection Committee may interview any Proponent(s) without interviewing others, and TAF will be under no obligation to advise those not receiving an invitation until completion of the evaluation and selection process.

3.7 Negotiations and Agreement

The award of any Agreement will be at the absolute discretion of TAF. The selection of a recommended Proponent will not oblige TAF to negotiate or execute an Agreement with that recommended Proponent.

Any award of an Agreement resulting from this RFP will be in accordance with the bylaws, policies and procedures of TAF.

TAF shall have the right to negotiate on such matter(s) as it chooses with the recommended Proponent without obligation to communicate, negotiate, or review similar modifications with other Proponents. TAF shall incur no liability to any other Proponent as a result of such negotiation or alternative arrangements.

During negotiations, the scope of the services may be refined, issues may be prioritized, responsibilities among the Proponent, all staff and sub-consultants provided by it and TAF may be settled and the issues concerning implementation may be clarified.

Any Agreement must contain terms and conditions in the interests of TAF and be in a form satisfactory to TAF's Solicitor.

If any Agreement cannot be negotiated within thirty (30) to ninety (90) business days of notification to the recommended Proponent, TAF may, at its sole discretion, terminate negotiations with that Proponent and negotiate an Agreement with another Proponent or abort the RFP process and not enter into any Agreement with any of the Proponents.

4.0 Proposal Submission Requirements

4.1 Proposal Documentation and Delivery

Submit proposals (due July 26, 2022 at 11:59 p.m.) to purchasing@taf.ca with the subject line *EDI Consultant*.

4.2 Proposal Content

Responses should be limited to six pages, not including proponent CVs.

- A 2-page letter summarizing your approach to the work including timelines, approach to working with the working group, and anticipated collaboration points.
- A 1-page summary of your experience with equity, diversity, and inclusion (EDI) consulting.
- A financial proposal containing high-level estimates of the amount of time (by individual) it will take to complete the work outlined in Objectives 1 and 2, including fixed prices, and an hourly rate to provide additional advisory services outlined in Objective 3. See Appendix B.
- Three references for similar work.
- CVs for all staff involved in the work.

5.0 Accessibility & Inclusion

We strive to build a team and supplier network that reflects the community we work in, and encourage proposals from traditionally underrepresented groups such as women, visible minorities, Indigenous peoples, people identifying as 2SLGBTQ+, people with disabilities, and others with the skills and knowledge to productively engage with diverse communities. If we can make this request for proposals easier through any accommodations in the process, please let us know by emailing Jaime Klein, People and Operations Manager, at purchasing@taf.ca.

6.0 Confidentiality and Conflict of Interest Agreements

The successful vendor will be required to sign a confidentiality agreement and Conflict of Interest Declaration.

APPENDIX A

PROPOSAL EVALUATION TABLE

PROPONENT'S NAME _____

CRITERIA	POINTS AVAILABLE	EVALUATION SCORE	POINTS AWARDED (points available x score / 5)
A) APPROACH TO WORK <ul style="list-style-type: none">• Understanding of deliverables• Ability to meet timelines• Reasonable expectations for TAF involvement	30		
B) EXPERIENCE AND QUALIFICATIONS OF THE PROPONENT <ul style="list-style-type: none">• Experience with equity, diversity, and inclusion consulting• Demonstrated knowledge of surveying for EDI benchmarking purposes	30		
COST: [FORMULA: (lowest cost Proposal / Proponent's Proposal cost x 40)	40		
TOTAL SCORE	100		

CRITERIA FOR EVALUATION SCORES

SCORING SYSTEM

0 – No Value: Fails to address the component.

1 – Poor: Minimally addresses the component, but one or more major considerations of the component are not addressed.

2 – Fair: The response addresses the component adequately, but minor considerations may not be addressed.

3 – Good: The response fully addresses the component and provides a good quality solution. Good degree of confidence in the Bidder's response or proposed solution met.

4 – Very Good: All considerations of the component are addressed with a high degree of confidence in the Bidder's response or proposed solution.

5 – Excellent: All considerations of the component are addressed with the highest degree of confidence in the Bidder's response or proposed solution. The response exceeds the requirements in providing a superior response or proposed solution.

APPENDIX B

PRICE DETAIL FORM

Complete the tables below, indicating estimated hours for the project team and a fixed price proposal for Objectives 1 and 2, and a blended hourly rate for Objective 3. All pricing should be exclusive of applicable taxes.

Fixed Deliverables: Objectives 1 and 2

	Estimated Effort (hours)			Fixed Price (\$)
	<i>Team Member Name and Position</i>	<i>Team Member Name and Position</i>	<i>Team Member Name and Position</i>	
Objective				
Objective 1				
Objective 2				

Advisory Services: Objective 3

Hourly Rate (\$/hour): _____

Estimated Price (for Evaluation): [Hourly Rate] * 10 hours = _____

Total Estimated Price

Based on the above, the estimated total cost is \$ _____ +HST