



REQUEST FOR PROPOSAL

FOR

**Development of an Online Assessment Tool using
Competencies for Training and Development Professionals©**

Issue Date: April 27, 2011

Due Date: May 20, 2011

PROPOSAL Submission to:

**Lynn Johnston
President
CSTD**

Canadian Society for Training and Development
PART A – GENERAL INFORMATION

1. BACKGROUND INFORMATION

The Canadian Society for Training and Development (hereinafter called “CSTD”) is a national, not-for-profit, membership association serving the field of workplace training and development. CSTD has more than 2,500 members in Canada drawn from the public, private, non-for-profit and labour sectors. For a professional involved in training and development in Canada, CSTD offers a unique opportunity to stay on top of this dynamic industry.

Vision: CSTD is the professional association in Canada focused on training, learning and performance in the workplace.

Mission: As the professional association for workplace training and development practitioners, CSTD is focused on defining the requisite body of knowledge and code of ethics, on developing the competencies of its members and on promoting and improving their collective reputation and image.

Goals and Priorities:

- To provide the Canadian workplace training and development community with a professional association offering relevant member services, professional development and resources.
- To provide the workplace learning and development profession in Canada with a common body of knowledge that is current and reflects the competencies and standards of the profession; and to ensure there are professional designations that are based on the common body of knowledge.

Our Customers: ALL workplace training and development professionals in all sectors in Canada.

2. PURPOSE OF REQUEST FOR PROPOSAL (RFP)

CSTD is soliciting proposals from qualified organizations/individuals to develop an online companion piece to the CSTD publication *Competencies for Training and Development Professionals*® (“Competencies”), the standard of practice for workplace training and development professionals in Canada.

3. SCOPE OF WORK

CSTD intends to enter into a contract with one (1) or more organization(s) or individual(s) for the following deliverable: An interactive online assessment tool using the content from *Competencies*. See Annex A for a detailed outline of the system specifications.

Bidders may purchase a copy of *Competencies for Training and Development Professionals*® at <https://britnell.com/cstd/competencies-training-and-development-professionals>. Members can download a copy from MYCSTD/Competencies on the CSTD website.

4. PROCUREMENT STANDARDS

This RFP provides a uniform method for the procurement of specified services, providing for full and open competition. It contains the necessary background, requirements, information, and instructions for responding to the RFP. All services solicited under this RFP shall be procured based on a competitive method. Selection and award will be made to the responsible entity/individual whose proposal is most advantageous to CSTD with qualifications, demonstrated performance, and cost being considered.

5. ELIGIBLE SUBMITTERS/CONTRACTORS

For-profit, non-profit, and other entities are eligible to respond to this RFP. Partnerships or joint ventures may respond, but details of the organization that will assume full financial responsibility for any resulting

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contract and how such partnership or joint ventures will function must be specified in advance in writing, and be included in the proposal. *CSTD* reserves the right to have such arrangements reviewed by its legal counsel to ensure that they are legally binding.

All respondents must have the necessary technical competence, knowledge, skills, and capacity to accomplish the work solicited in this RFP. The selected contractor may not assign, transfer, subcontract, or otherwise dispose of any portion of a contract in whole or in part, to any third party without the prior written approval of *CSTD*.

Preference will be given to CTD holders (see section 12, Proposal Evaluation).

6. TYPE OF CONTRACT

CSTD may execute a fixed-fee or cost reimbursement contract with the selected respondent.

7. CONTRACT PERIOD

CSTD expects to execute a contract with an effective date of June 15th, 2011, assuming successful contract negotiations, and ending no later than September 15th, 2011.

8. PROPOSAL CONSIDERATION

In the selection and award of a contract for services procured under this RFP, *CSTD* shall ensure that: (1) all proposals considered for review are received by the prescribed deadline; and (2) all proposals received meet all specifications/requirements contained in the RFP.

9. RESPONSE DEADLINE

The response deadline for this RFP is **no later than 4:00 p.m. on May 20, 2011**. Proposals, whether mailed or hand-delivered, must be officially received at 720 Spadina Ave, Suite 315, Toronto ON M5S 2T9 by this deadline. **Late proposals will be disqualified from consideration regardless of the circumstances.** The timely delivery of a response is the sole responsibility of the submitter. Additions or deletions must be submitted and included in the proposal on or before the deadline. A withdrawal of a proposal is allowable only in person by an authorized representative providing proper identification. Under no circumstance shall *CSTD* staff or a board member deliver a proposal to the required location for a proposing entity.

10. TECHNICAL ASSISTANCE

Interested parties may seek clarification, explanation, or ask questions pertaining to this RFP by attending the Bidder's Conference. Written questions will be answered on the Bidders' conference as noted below.

A Bidders' teleconference will be held on Wednesday, May 11th, 2011 at 12 noon Eastern Standard Time. This will be held if interest warrants it. **Expression of interest in the teleconference must be received by email by Monday May 9th, 2011 at 4:00 pm.**

Written questions will be accepted by email and must be addressed to: ljohnston@cstd.ca

All questions submitted will be responded to on the Bidders' call only, provided they are received **no later than 4:00 p.m. on May 9th, 2011**. *CSTD* staff may not provide individual assistance in writing proposals. Technical assistance may only be provided as described in this section. **No other contact regarding the RFP is permitted.**

11. GOVERNING PROVISIONS AND LIMITATIONS

- A. The purpose of this RFP is to ensure maximum, open, and free competition in the solicitation services. This RFP is not to be construed as a purchase agreement or contract or as a commitment of any kind; nor does it obligate *CSTD* to award any contract or to pay for costs incurred prior to the execution of a formal contract unless such costs are specifically authorized in writing by *CSTD*.
- B. *CSTD* reserves the right to accept or reject any or all proposals received, or to cancel or reissue this RFP in part or in its entirety.
- C. *CSTD* reserves the right to correct any error(s) and/or make any changes to this solicitation as deemed necessary. Notification of any change to this RFP will be provided to all bidders receiving a copy of the RFP.
- D. *CSTD* reserves the right to negotiate the final terms of any contract awarded as a result of this solicitation with the submitter selected.
- E. *CSTD* reserves the right to contact any individual or entity listed in a proposal that may have knowledge of the submitter's experience, performance and qualifications.
- F. *CSTD* reserves the right to terminate or cancel this RFP and any resulting contract if funding is not available.
- G. Submitters shall not, under penalty of law, offer or provide any gratuities, favors, or anything of monetary value to any officer, member, employee, or agent of *CSTD* for the purpose of having an influencing effect toward their own proposal or any other proposal submitted hereunder. In addition, no employee, officer, or agent of *CSTD* shall participate in the selection, award or administration of a contract supported by *CSTD* funds if a conflict of interest is involved.
- H. Submitters shall not engage in any activity that would restrict or eliminate competition.
- I. The contents of a successful proposal may become a contractual obligation if selected for award. No plea of error or mistake shall be available to the successful submitter as a basis for release of proposed services at stated price/cost.
- J. *CSTD* reserves the right to request clarification of, explanation for, or verify any aspect of a response to this RFP, and to require the submission of any price, technical or other revision to the RFP that results from negotiations conducted.
- K. *CSTD* reserves the right to award a contract without discussion.
- L. *CSTD* reserves the right to reject any proposal that fails to conform to the essential requirements of the RFP.
- M. *CSTD* reserves the right to extend, shorten, increase or decrease any contract awarded as a result of this RFP at its sole discretion.
- N. *CSTD* reserves the right to depart from the strict ranking by evaluation scores, whenever it deems such departure will better serve the best interests of *CSTD*. Contract award does not have to be made to the bidder submitting the lowest price proposal, but rather to the bidder submitting the most responsive proposal satisfying *CSTD*'s requirements.

- O. *CSTD reserves the right as part of the selection process to request a presentation from selected bidders. Only those bidders short-listed will be asked to make presentations and CSTD is under no obligation to extend this invitation to all Bidders.*

12. PROPOSAL EVALUATION AND SELECTION PROCESS

- A. Determination of Responsiveness – All proposals received by the deadline will be reviewed for responsiveness to the specifications/requirements of the RFP.
- B. Evaluation - All proposals determined to be responsive will be reviewed, rated, and ranked by a review team consisting of *CSTD* staff and/or external evaluators, using the criteria listed below:

1. Qualifications	20 Points
- Organization or individual history	
- Company profile	
2. Demonstrated Performance/Experience	30 Points
- Examples of past work	
- Resumes of key personnel	
3. Quality of Approach	35 Points
- Strategy	
- Timeline/Deliverables	
4. Budget/Reasonableness of Cost	20 Points
- Value	
5. CTDP designation of team member	5 Points

C. Selection/Award

Selection and award of contract will be decided by the *CSTD*. Execution of a contract shall be dependent upon successful completion of negotiations.

PART B – INSTRUCTIONS FOR SUBMITTING A PROPOSAL

1. GENERAL INSTRUCTIONS

- A. Format – Responses must be typed and submitted on 8 ½ x 11 inch white paper. Do not use less than a 10-point font and leave at least a 1-inch margin on all sides. Each page of the response, with the exception of the Cover Sheet, must be sequentially numbered, including attachments.
- B. Number of Copies – One (1) complete, signed original and 1 electronic copy must be submitted by the deadline.
- C. Labeling and Submission – Proposals must be submitted in a sealed envelop or package externally labeled as follows:

CSTD Online Assessment Tool Proposal

Attn: Lynn Johnston

President

720 Spadina Ave, Suite 315

Toronto, ON

M5S 2T9

The electronic copy is emailed to ljohnston@cstd.ca with subject line:

CSTD Online Assessment Tool Proposal

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All materials submitted in response to this RFP become the property of *CSTD*. Selection or rejection of a proposal does not affect this right. *CSTD* is not liable for any costs incurred by submitter prior to the issuance of, or entering into a contract. Costs associated with developing a response are entirely the responsibility of the submitter, and shall not be reimbursed in any manner by *CSTD*.

2. PROPOSAL COVER SHEET (ANNEX B) – A fully completed and signed Cover Sheet must be submitted.

3. RESPONSE NARRATIVE – The following information, in the order listed below, is required:

Qualifications/Experience

- A. Provide a brief summary of your organization's experience in providing services similar to those solicited under this RFP.
- B. Describe the history and structure of your organization: how long you have been in business, description of ownership, principle location, and number of employees.
- C. Describe the capabilities and capacity of your organization. This may include links to similar work developed by the firm or accompanying dvd's. Ensure access accompanies this proposal. *CSTD* will not contact bidders if access is restricted and passwords not provided.
- D. Identify all personnel that will be assigned to any work under the project. Provide a summary of their qualifications. Identify the person who will serve as the lead/primary contact for the project.
- E. Provide at least three (3) references of current and/or former clients for whom you have provided similar services described under this RFP during the last two years. Include company name, contact, address, phone, email address (if available), and dates of service.
- F. Provide any additional information that would support your firm's qualifications and experience.

Approach to Services

- A. Describe your general approach in working with *CSTD* on this project. Outline the process you will use to develop the assessment tool.
- B. Describe any methodology to be used for the development of the companion piece and your approach to the deliverable.
- C. Provide a detailed timeline for the proposed project including start and end dates. Include a detailed description of the deliverable.

4. BUDGET – Complete Annex D

5. SUBMISSION PACKAGE

Include the following:

- Proposal Cover Sheet (ANNEX B)
- Response Narrative
- Assurances and Certifications (ANNEX C)
- Budget Form (ANNEX D)

ANNEX A

Specifications for an Online Assessment Tool using *Competencies for Training and Development Professionals*©

Structure of the Online Assessment Tool

- Include each of the five competency areas:
 - Assessing Performance Needs
 - Designing Training
 - Facilitating Training
 - Supporting Transfer of Learning
 - Evaluating Learning

Also include content from the Key Output and Quality Criteria section as appropriate.

- A separate section for each competency area is required. Include all competencies to level 3. For each competency area, the user identifies his/her own competency level on a scale and selects the relevance of that competency to his/her current position on a scale
- User may select to analyze one or more core competency areas. An output report can be generated for each competency area or for all competency areas
- Sample concept of an Output Report
There are 4 possibilities in the analysis: these should all be identified.
 - Fully competent and required for the current position
 - Fully competent but not required for this position
 - Gap exists but competency is required for the current job
 - Gap exists but is not required for this job but serves as a development goal
- Gap Analysis should identify priorities A, B or C depending on whether the gap relates to the current position or not
- Gap Analysis points to some resources such as the selected bibliography in the Competencies document (not the definitive resource list) and the list of recognized programs on the CSTD website. Most companies have their own development planning processes and tools so these resources are not meant to be definitive.
- User must be able to download the outputs of the process and to save the reports in a usable format, both paper based and electronic
- Bidders are encouraged to describe how their tool might integrate, or what would be required to integrate, into other development planning tools/systems

ANNEX B

Proposal Cover Sheet

Organization name	
Mailing address	
Physical address (if different from above)	
City/Province/Postal Code	
Contact person Telephone number Email address	
Type of organization	<input type="checkbox"/> Sole Proprietor <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation <input type="checkbox"/> Other:
GST Number	

AUTHORIZATION FOR SUBMISSION

Name and Title authorized signatory*	
Signature	
Date	

*Authorized signatory must be someone authorized to bind the proposing entity

ANNEX C

ASSURANCES AND CERTIFICATIONS

Each organization or individual that submits a proposal in response to a Request for Quote warrants and assures:

1. The information contained in this proposal is true and correct.
2. The costs described in the proposal budget accurately reflect the submitter's cost of providing services.
3. No partner, employee or any other individual associated with an organization or individual person offering a proposal under this Request for Proposals has offered or will offer any gratuities, favors, or anything of monetary value to any Board of Director or staff of *CSTD* for the purpose of or having the effect of influencing the decisions of *CSTD* with respect to the organization or individual's proposal or any other proposal.
4. No partner, employee or any other individual associated with an organization or individual person offering a proposal under this Request for Proposals has engaged or will engage in any activity which may be construed in restricting or eliminating competition for funds available under this Request for Quote.
5. The organization or individual possesses the legal authority to offer this proposal.
6. If the submitter is an organization, a resolution, motion, or similar action has been duly adopted or passed as an official act of the submitter's governing body authorizing the submission of this proposal.
7. No person will be excluded from participation in, be denied the benefits of, be subjected to discrimination under, or be denied employment in the administration of or in connection with any program operated with funds from this Request for Quote because of race, color, religion, sex, national origin, age, disability, sexual orientation, or political affiliation or belief.

By signing I acknowledge that I have read these assurances and certifications and that I am authorized to bind the organization I represent to these requirements should this proposal be accepted for funding by *CSTD*.

Signature
Typed Name and Title

Proposing Organization
Date

ANNEX D

BUDGET FORM

The total cost to develop the online companion piece to
Competencies for Training and Development Professionals© \$_____

**Budget Narrative optional (provide an explanation for all costs – i.e. hourly rates, set-up fees, etc.)
Attach additional page(s) if needed.**