



Co-operative
education and
work-integrated
learning



Enseignement
coopératif et
apprentissage
en milieu de travail

Request for Proposal (RFP)

Professional Association Management Services Provider

**Co-operative Education and Work-Integrated Learning Canada
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Toronto, ON M5A 3S5**

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Association Overview

History of CEWIL Canada

Cooperative Education & Work Integrated Learning (CEWIL) Canada, (formerly the Canadian Association for Co-operative Education – CAFCE), is the leading organization for work-integrated learning in Canada. Its mission, in partnership with post-secondary institutions, community members, employers and government, is to build the capacity to develop future-ready students and graduates through quality work-integrated learning.

CAFCE was formed in 1973 when 29 representatives of 15 post-secondary institutions from across Canada met at McMaster University and Mohawk College in Hamilton, Ontario, formally adopting a constitution and electing a board of directors. In 2017, the membership of CAFCE voted to adopt a new association name to better reflect a broader mandate of support for multiple forms of work integrated learning (WIL). The new name, Co-operative Education and Work-Integrated Learning Canada (CEWIL Canada) was adopted.

Since its inception, CEWIL Canada members, now from over 100 post-secondary institutions across the country have worked in partnership to develop resources to promote the highest quality of post-secondary co-operative education and work-integrated learning programs. This is achieved through a national forum of professional Co-op and WIL practitioners, by establishing national standards, by promoting the value of post-secondary work-integrated learning and by delivering opportunities for learning and sharing of best practices.

CEWIL currently has ~850 members including post-secondary members and educators engaged in offering WIL programs, to community members and employers, representing every geographic area in Canada. The Association is led by a volunteer board of nineteen (19), which includes a 5 member executive, regional representatives from across the country, University and College Co-op and WIL representatives, and employer representatives.

Over the past 3 years CEWIL has experienced significant growth in membership and has enhanced its national advocacy initiatives on behalf of the more than 75,000 students currently participating annually in co-operative education and WIL programs. CEWIL maintains a national database on WIL with co-op data from more than fifty post-secondary member institutions.

Vision

To be the voice for postsecondary co-operative education and WIL in Canada.

Mission

To foster and advance post-secondary co-operative education and WIL in Canada. We do this through a national forum of professional co-operative education and WIL practitioners by

establishing national standards and promoting the value of co-operative education, and delivering opportunities for learning and sharing best practices.

Goals

1. Membership Engagement through the following:
 - Accreditation of university and college co-op programs.
 - Developing pro-active plan for recruitment and staffing of all board and committee positions.
 - Annually recognizing members who provide leadership to the association.
 - Practice sound financial management to ensure continued financial health of CEWIL.
 - Collaboration with CACEE and regional associations.
 - Develop certification program for WIL practitioners.
 - Establish stronger onboarding of members.
 - Continue to offer robust set of PD offerings to members annually.
 - Evaluate current membership base in terms of participation by region, type of institution, form of WIL represented and employer and community partners.

2. Advocacy for Co-operative Education and WIL with internal and external partners through the following:
 - Maintenance of a National co-op database and expansion to other forms of WIL.
 - Maintain CEWIL program accreditation standards and creation of WIL Quality Improvement framework and standards.
 - Advocacy with government/industry/academic leadership.
 - Continue to support calls for national tax credit and hiring incentives for co-op programs.
 - Support technology tools to enhance WIL outcomes and experiences for all stakeholders.

3. Enhancing and expanding the CEWIL brand.
 - Utilize the new brand for CEWIL and communicate our story using vehicles such as the new web site.
 - Enhance social media strategy to engage members.
 - Increase PR activities to include more proactive responses to WIL-related issues

Requirements

CEWIL Canada is currently seeking proposals from qualified individuals and/or firms for the provision of professional association management services. The following Request for Proposal (RFP) describes the areas of expertise and support that are sought for CEWIL meetings, activities operational and administrative tasks. CEWIL seeks to establish a long-term relationship and a contract with an individual and/or firm that is experienced in providing professional association management services. The CEWIL board will conduct an evaluation of submitted proposals and will award a contract to the individual and/or firm whose proposal is determined to be most advantageous to CEWIL considering the evaluation factors set forth in the RFP.

Preamble

Proponents (individuals and/or firms) are invited to submit Proposals for the provision of Services in accordance with the specifications and terms and conditions set out in this RFP. This competitive procurement will be conducted in accordance with one fundamental objective: to maximize the benefit to CEWIL while offering Proponents a fair and equitable opportunity to participate. Proponents are advised to pay careful attention to the wording used throughout this RFP. Failure to satisfy any term, condition or mandatory requirement of this RFP may result in rejection of the Proposal.

Term of Contract

The initial contract resulting from the RFP will be effective after approval by the CEWIL National Board of Directors to start on an agreed upon date for a period not less than three (3) years and not to exceed five (5) years. Initial contract will have an annual renewal contingent upon contractual requirements being satisfied based on an end-of-year review by CEWIL Board of Directors or another CEWIL agent acting on behalf of the board.

Scope of Contract

The following information, provided to prospective individuals and/or firms, describes CEWIL's expectation of the awarded professional association management contractor's responsibilities, as they relate to providing professional association management services to CEWIL. The selected contractor will report directly to the CEWIL President and its National Board of Directors. The scope of contracted work includes, but is not limited to:

Operational Support

- Assist in the implementation of directives of the executive committee and the national board of directors ensuring high standards of initiative and follow through to task completion.
- Maintain contact list of association leadership and provide information to current/future board members as needed.

- Assist with the implementation and administration of monthly board meetings and various national board committees and task forces, either in person or virtual, as requested or needed by CEWIL executive and/or national board of directors.
- Coordinate the production and provide feedback on communication materials (i.e. meeting agendas, committee minutes, etc.) at the request of National Board members or Committee Chairs.
- Call for Executive Board, committee, and regional reports; compile and prepare the distribution of annual reports for presentation at the Annual General Meeting.
- Assist the CEWIL President and committee chairs in identifying vendors, negotiating and signing contracts for facilities, catering, materials and other services needed for CEWIL board meetings as needed.
- Assist with CEWIL administrative and leadership continuity by ensuring accurate administrative record keeping and transitioning historical knowledge, documents to new board members as needed.
- Assist CEWIL President and Secretary to prepare draft agendas for all Board meetings.
- Coordinate the collection of proxy votes; monitor quorum at all meetings of the association.
- Provide support of meeting calendaring and scheduling.

Co-op Accreditation Council Support

- Respond to basic inquiries about accreditation criteria; forward complex requests to Chair of Accreditation Council.
- Source historical applications/documentation upon request.
- Receive and archive initial application submission material; prepare fee invoices and notify chair.
- Assist in the preparation of two to three council meetings annually; meeting logistics, teleconference support, distributing agendas/materials, collecting proxies and monitoring quorum.
- Attend meetings if feasible and act as recording secretary to prepare draft minutes.
- Maintain application tracking document which records institutions, programs, review team membership, results and certification expiry dates.
- Update accreditation section of the website.
- Receive and archive Review Team Reports.
- Prepare letters announcing accreditation results and produce accreditation certificates.
- Provide assistance to the Chair in developing annual budget.

Translation Services (English/French)

- Provide CEWIL with translation and editing services for English to French and French to English service for internal and external documents including, but not limited to:
 - CEWIL national reports and documents
 - Research, academic and sector specific statements

- Marketing, Webpage, social media content and documents
- Newsletters, statements of purpose and other membership focused materials
- Assist CEWIL in identifying and adopting best practices for ensuring the timely and accurate translation of CEWIL promotional and informative material.

Financial Administration Support

- Manage CEWIL financial records at the direction of the CEWIL President and Treasurer, maintaining current and all financial data using relevant software.
- Assist CEWIL Treasurer with financial reporting by entering and maintaining transactions into financial management/reporting software as directed by national board.
- Provide financial reports and/or documents to appropriate CEWIL national officers as requested by Treasurer and national board.
- Develop, administer and update CEWIL financial reporting templates, tools and other resources as directed by CEWIL national board.
- Assist Treasurer and Board with annual budget preparation.
- Process invoices in coordination with Treasurer.
- Process money received (checks, credit cards, cash) as required.
- Reconcile bank and credit card statements as directed by CEWIL Treasurer.
- Provide receipts and/or refunds to CEWIL members as directed by CEWIL president, Treasurer and/or National board.
- At the direction of the CEWIL Treasurer, reimburse CEWIL members, officers, board members and others for approved expenses in an appropriate and timely manner.
- Prepare information and financial reports and/or documents for annual audits and other financial filing purposes as directed by CEWIL Treasurer and/or National board.

Website, Social Media, Publication and Communications Support

- Maintain membership database to ensure that email lists, social media accounts and other marketing information is current and accurate.
- Provide proactive website support and assistance with respect to webpage design, content and strategy development. Ensure that all content is accurate and posted or shared in a timely fashion.
- Proactively post, share, distribute CEWIL news and activities and other association related news of interest to website, membership database and across social media.
- Support president, national board of directors and committee chairs with the development, creation and distribution of CEWIL Board and Committee Orientation Handbook and other content.
- Maintain a calendar of events, initiatives, workshops and professional development activities; ensure that details regarding pricing and registration are accurate.

- At the direction of the president and/or national board of directors, prepare and distribute electronic correspondence (emails, newsletters, announcement, etc.) related to CEWIL activities and membership initiatives.
- Identify, negotiate and maintain current vendor/software contracts in coordination with CEWIL national board to support communication and publication activities of CEWIL.
- Maintain permission levels for website, social media and other communications assets and transfer permissions as needed for CEWIL leadership and volunteer changes.
- Communicate with National and regional boards, CEWIL sub committees and membership for the solicitation of CEWIL related information and content for use on web, social media, newsletter and other print and electronic publication.
- Serve as point person for the contracted web service provider; make recommendations on website service providers to enhance CEWIL brand.

Statistics Database

- Conduct outreach for quarterly stats to key institutional contacts in the membership database
- Provide approved members with administrative access to the database
- Send the CEWIL Stats Database User instructions and provide support to users in uploading data
- Prepare reports from the database at the request of CEWIL National Board
- Make recommendations on database vendors and prepare RFPs as required
- Maintain database integrity

Professional Development Events and Conference

- With the Chairs, CEWIL Conference or Pro-D Committee, provide support in managing the bi-annual national conference to be held in selected cities nationally, and any and all accompanying virtual conferences and other events.
- Advise national and regional event chairs and committees on conference best practices and event logistics.
- Identify and negotiate conference and event site contracts in coordination and at the direction of the CEWIL president, national board and/or committee chairs. Serve as primary point of contact for annual conference and other professional development events for CEWIL membership and event attendees, speakers and other CEWIL officers.
- In conjunction with Chair, assist in securing conference and event sponsors, exhibitors and speakers and coordinate sponsor agreements and facilitate required payments.
- Assist national board and committee chairs with promotion of annual conference and other events as directed by the president of CEWIL.
- Under the direction of the Chair of Professional Development Committee, organize logistics, secure guest speakers and promote professional development sessions/webinars/teleconferences to membership.

- Oversee invitation, announcement and updates of national conference, regional professional development initiatives and other events.
- Assist conference and event participants with registration via email, web and or phone.
- Manage pre-registration and on-site registration for conference and events, as needed and as applicable, which includes the collection of attendee payments.
- Prepare reservations list and other materials as needed for national, regional conferences and other events.
- Oversee promotion on the ground at conferences and other events, including photography, for the purposes of website, social media, newsletters and CEWIL archival initiatives.
- Oversee awards reception, meeting and special programs occurring within national, regional conferences and other events as directed by CEWIL president and national board of directors.
- Provide post event reports to be used for membership communications and national board planning and strategy development.

Awards and Board Nominations

Board Elections/Member Service Awards

- Manage the call out for awards annually, including member service awards and Board elections.
- Respond to basic inquiries about awards and nomination criteria; forward more complex requests to respective committee chairs or CEWIL President.
- Update web pages; prepare announcements, notify successful nominees, award winners and institutions.

Co-op and WIL Student of the Year Awards

- Review each nomination package to ensure that all required material is included; contact those institutions with missing material.
- Collect, upload and distribute nomination packages to Committee members; generate score sheets and collate scores for Chair.
- Generate certificates and cash award for winners and certificates for the honourable mentions to be presented during National Co-operative Education/WIL Week.
- Provide assistance to the chair in developing annual budget.

Membership Support

- Maintain membership database including addition of new members, renewals, removal of past members and job title/address/email and other changes.

- Provide the CEWIL president and national board of directors with monthly reports of memberships and other related list as requested.
- Remind members of renewals and processes membership payments and fees.
- Update provincial membership lists to distribute to Regional Representatives.
- Advise national board and relevant committee chairs on membership recruitment and communication strategies.

Administrative Support

- Record nature and number of incoming requests (telephone calls, emails, mail, social media, etc.) and respond to those that are administrative in nature. Ensure all other inquiries are sent to the most appropriate CEWIL individual to address in a timely manner.
- Forward inquiries that require a decision and/or additional consideration to the CEWIL president, other appropriate officers, chairs or the CEWIL national board of directors.
- Oversee administrative print and electronic files and records, and coordinate the timely transfer to the CEWIL archives or repository.
- Maintain passwords, log-in information, signing authority information and other important CEWIL related administrative details for all accounts, vendors, platforms used by CEWIL.
- Manage association equipment, supplies and software used for the routine administrative operations of CEWIL (e.g., credit card machines, banners, member nametags).
- Submit and/or post event photos, calendar listings, press releases, etc. to news media and/or as directed by the CEWIL president and/or national board of directors.
- Assist the board with conducting surveys and assessments, analyzing data and producing reports, as directed by CEWIL.

Response Format and Instructions

Response must include the following information that will serve as the basis for rating demonstrated qualifications of the individual and/or firm for the purposes of this RFP. CEWIL president and national directors will evaluate proposals on the basis of the following information that must be submitted in any and all responses:

1. Executive Summary: Condense and highlight the content of the proposal. The summary should provide the CEWIL national board of directors with an overall understanding of the proposal and the individual and/or firm's approach.
2. Evidence of the individual and/or firm's ability to provide appropriate association management services, including company background and history.
3. Individual and/or firm's proposal must address the following:
 - Identify how the individual and/or firm will manage, service and support CEWIL.

- Describe the individual and/or firms’ experience working with similar clients and/or associations, including approximate budget levels and costs.
 - Present a detailed process for your services and how those services correspond to the needs of CEWIL.
 - Describe service standards (not the services, but the quality of standards attached to those services) that you have in place and the process to address when service level standards are not met.
4. Detail the fees associated with providing the detailed scope of work provided above and any additional cost associated with providing association management support to CEWIL.
 5. Individual and/or firms may also provide any additional information that may be beneficial to the overall evaluation of the individual and/or firm’s proposal.

Submission and General Instructions

Individuals and/or firms responding to this RFP shall submit their proposal by email to the CEWIL President, Kristine Dawson at Kdawson@conestogac.on.ca no later than March 15, 2019. Late submissions and/or proposals will not be accepted or considered.

Important Date	Deadline
RFP Notice – Open for Submissions	February 28, 2019
Proposal Submission deadline	March 15, 2019
CEWIL national board to review submissions	March 20, 2019
Oral presentations and interviews [if required]	March 20-26, 2019
Approval by CEWIL national board and contact with selected proposal representatives	By March 29, 2019
Signing of contract with selected service provider and transition period from current provider.	April 1-30, 2019

All proposals should be submitted as a word document or a pdf. Submitted proposal should not exceed 12 printed pages in their entirety, inclusive of appendices and other reference material. CEWIL cannot ensure that information beyond 12 pages in length will be reviewed or considered. Font size for basic descriptions should be no smaller than 10 point font, Arial or 12 point font, Times New Roman.

The subject line of email submissions should read: **CEWIL Association Management Services Proposal 2019.**