

**October 17, 2022**

**Request for proposal**

Hamilton Community Foundation is requesting a brief proposal to assist us with a short project to facilitate and support a staff committee to develop an equity, diversity, and inclusion education program. Submission date is November 4, 2022.

**Background**

Hamilton Community Foundation was established in 1954 as Ontario's first community foundation. Today, it is a member of over 191 community foundations across Canada and a rapidly-expanding international network. In a nutshell, community foundations have three roles:

- Working with donors to build funds that support local charities.
- Giving grants across all sectors of the community: arts and culture, education, recreation, health and human services and the environment.
- Community leadership – bringing people together to address issues and opportunities facing their communities.

HCF is driven by its:

- Vision: A vibrant, diverse and inclusive Hamilton, and
- Mission: To drive positive change by connecting diverse people, ideas and resources.

Our website: [www.hamiltoncommunityfoundation.ca](http://www.hamiltoncommunityfoundation.ca) provides more information. Though Hamilton Community Foundation has had a long emphasis on diversity, equity and inclusion in its work, a focused and intentional effort was launched as part of strategic planning in 2007, when the Foundation formally adopted inclusiveness as a corporate value. Since then, we have conducted three external diversity and inclusion reviews of all aspects of our strategy and operations. Our most recent was completed in 2019, the results of which formed the basis of an ongoing diversity and inclusion action plan to reflect a diverse, inclusive Hamilton in everything we do.

**Scope of work**

In 2021 HCF embarked on the development of an EDI Staff Education Plan in line with the overall EDI action plan. HCF engaged a consultant to create a curriculum outline based on input and feedback from staff members. The result was the Equity, Diversity, and Inclusion Curriculum Outline Report that includes a series of recommendations around timing, learning modes and content. We are now looking for a consultant to help us implement these recommendations.

The scope of the work includes:

- Analyzing and advising on prioritizing key recommendations outlined in the Equity, Diversity, and Inclusion Curriculum Outline Report.
- Develop curriculum for EDI Education Plan, and a plan (e.g. timeline and resources required) for its delivery.
- Review resources through the Canadian Centre for Diversity and Inclusion (CCDI), which HCF has access to, and suggest further resources as relevant.

To provide context to the work, HCF will provide the report and advise the successful consultant on what has been done to this point to develop the Staff Education Plan.

### **Experience and qualifications**

The successful consultant will have an in-depth knowledge and understanding of diversity and inclusion issues, and an understanding of EDI training for the workplace. Experience in engaging with local (Hamilton) equity-seeking groups is considered an asset.

Our estimated budget for this project is \$5,500. We would like to complete this work by March 15, 2023.

### **Proposal Content**

If your firm is interested in bidding on this work, please provide a proposal to Michael Parente, Communications Specialist, at [m.parente@hamiltoncommunityfoundation.ca](mailto:m.parente@hamiltoncommunityfoundation.ca). The proposal must include the following:

- Your understanding of the organization and the scope of work to be accomplished.
- Examples of your work that demonstrate your experience in conducting similar projects; in particular we are interested in work conducted with non-profits/charities.
- Project plan and critical path/timeline. It is anticipated the work would commence approximately during the week of December 5, 2022, and be completed by March 15, 2023.
- Your expectations from the HCF team.
- Deliverables. We expect that at a minimum this would include:
  - A modular EDI Education plan for staff, including:

- An outline of key topics covered, prioritized in collaboration with HCF’s EDI committee.
- Resources to support staff learning related to specific EDI priorities, identified primarily by the consultant, in collaboration with HCF’s EDI committee.
- Activities to facilitate staff engagement with the content of each module.
- Meeting with senior management to receive and discuss the EDI staff curriculum.
- Fee proposal, plus hourly and per diem rates for any additional services.
- The names and contact information for two organizations for whom you have completed similar work in the past three years that we may contact.

**Evaluations**

Proposals will be evaluated on:

- An understanding of HCF and its goals.
- The proposed approach to achieving the goals of the project.
- Past performance – demonstrated expertise in providing similar projects, in particular working as a collaborative partner and resource to staff in completing the work plus references.
- Fees.

Short-listed firms may have an opportunity to expand on their proposal via zoom. This will consist of a 30 minute zoom meeting to ask and answer questions about the proposal.

**Process**

***Task***

***Date***

**Submission deadline**

**November 4, 2022**

Shortlisted candidates meet with EDI committee

Week of November 14, 2022

Successful candidate informed

Week of November 21, 2022

Contract begins

December 1, 2022

**RFP Terms**

1. The proponent firm shall bear all costs associated with responding to this RFP.
2. HCF is not bound to explain its decision regarding submitted proposal.

3. By accepting a proposal, HCF does not intend to bind itself legally in any way. HCF intends solely to begin negotiating a contract on the subject matter of the proposal. Unless HCF states otherwise in writing at the time, oral or written communications between the firm and HCF on the subject matter of the proposal are always to be considered as subject to the execution of a formal written agreement. In addition, the execution of this contract in no way binds HCF to an ongoing relationship with the vendor. This contract should be considered as a standalone.
4. Prior to the closing date of this RFP, respondents should not establish contact with anyone (staff or board) inside the organization regarding this RFP, other than the representative identified. Failure to abide by this requirement could be grounds for rejection of your proposal.

### **Background materials**

A fact sheet is attached; our website is [hamiltoncommunityfoundation.ca](http://hamiltoncommunityfoundation.ca); Twitter: @HamCommFdn, Facebook: @HamCommFdn. A copy of our annual report is available [here](#); if you would like a hard copy, please contact Michael Parente (see below).

### **HCF Representative/Contact**

Please direct all questions to:

Michael Parente

Communications Specialist

Phone: 905-523-5600 x 263

Email: [m.parente@hamiltoncommunityfoundation.ca](mailto:m.parente@hamiltoncommunityfoundation.ca)



# ABOUT HCF

## Our vision

A vibrant, diverse and inclusive Hamilton.

## Our mission

To drive positive change by connecting diverse people, ideas and resources.

## How we do it

- By helping people give in a way that has meaning to them and impact in the community.
- By supporting all aspects of community life through grants and loans to a wide range of charitable organizations and initiatives.
- By bringing people together to address priority issues that affect Hamiltonians.

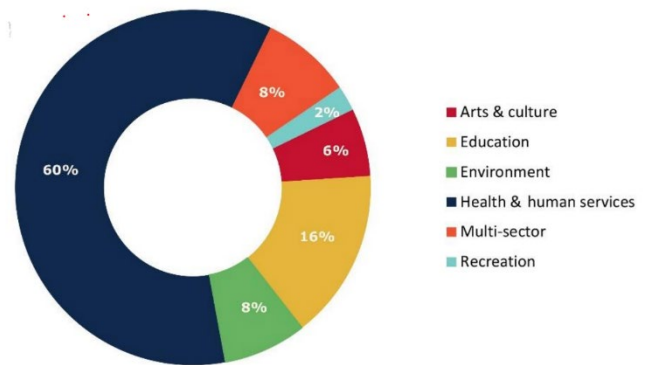
## Facts at a glance

Year ended March 31, 2022

- Total assets: \$261.1 million, including \$31.6 million in impact investments generating both a financial and social and/or environmental return
- Operating expenses: 1.03 percent of average total assets
- Donations received: \$10.8 million last year
- Grants and community leadership spending: \$13.6 million last year which included 918 grants to 344 organizations
- Loans to charities and not-for-profits: \$11.9 million

## Grants by sector

Year ended March 31, 2022<sup>1</sup>



HCF is one of some 200 community foundations across Canada.

<sup>1</sup> Total granting reflects Board-directed granting and the interests of those who have established donor-advised and designated funds.



## Community leadership

**Pandemic response.** In March 2020, we established the \$2 million Pandemic Response Fund. Its purpose is to meet immediate basic needs, stabilize services to vulnerable populations, support Hamilton's recovery and rebuilding, and strengthen its long-term resilience. As of March 31, 2022 more than \$4 million has been granted to Hamilton organizations.

Read more: [hamiltoncommunityfoundation.ca/covid19](https://hamiltoncommunityfoundation.ca/covid19)

**ABACUS: Advancing Post-secondary Access** is a 10-year commitment to increase the likelihood that young Hamiltonians — especially those typically under-represented in post-secondary — will graduate from high school, and access post-secondary opportunities. ABACUS focuses on the middle-school years, a time where youth experience significant changes that affect the educational path. ABACUS focuses on the factors that affect students' likelihood of continuing their education including the transition into and out of the middle-school years, the importance of children's overall social and emotional wellness to their academic achievement, and the needs of students historically underserved in the education system.

Read more: [ABACUSatHCF.ca](https://ABACUSatHCF.ca)

**Impact investing.** Recognizing that all investments have impact, we believe they can be powerful tools to accelerate achieving our vision and mission. Impact investing works toward this goal by targeting investments that generate both financial and social/environmental returns. We are committed to aligning all our investments with our mission and vision both through impact investing and responsible investing: public market investments that integrate environmental, social and governance factors into their selection and management.

Read more: [hamiltoncommunityfoundation.ca/impactinvesting](https://hamiltoncommunityfoundation.ca/impactinvesting)