



Request for Proposal Review and Update of Directors' Education & Accreditation Program (DEAP)

1.0 – Introduction

The Chartered Governance Institute of Canada (CGIC) is seeking proposals from Subject Matter Experts (SMEs) to review and update its DEAP materials. DEAP consists of three modules, and we are looking for an SME for each. Please note that an SME can also provide a proposal to review and update more than one module.

This is a request for proposal (RFP) and not an invitation to tender. The reader is hereby advised that we reserve the right to:

- a. Accept a proposal without negotiation.
- b. Negotiate changes to the technical or financial content of the successful proposal; or,
- c. Cancel or reissue this RFP at any time.

The information contained in this document and appendices is proprietary to The CGIC and may not be divulged to any third party.

The contact for the purposes of response to this request for proposal is:

David Miriguay

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david@charteredsite.com

**Proposals should be submitted in PDF format to:
david@charteredsite.com by April 30, 2022**

2.0 – Background

The CGIC released its current materials in 2019 and, after 3 years, wants to ensure no additions or updates are required.

The program has been developed for individuals in the corporate marketplace, however, The CGIC is interested in the possibility of taking the content and redeveloping it for 2 additional markets:

- a. Not-for-Profits; and,
- b. The Caribbean.

DEAP consists of three modules:

1. Finance for Directors
2. Governance for Directors
3. Strategic and Risk Management for Directors

Each module is presented over 7 contact hours in one day. Materials must be developed to allow multiple presenters to be able to present the same modules with the same high-quality results.

DEAP is designed to be integrated, balanced, effective and engaging for all participants.

If additional reiterations of the program are offered, the integrity of Accredited Director (Acc.Dir.) designation awarded to participants who successfully complete the program must be maintained across all versions.

3.0 – Scope of Work Required

The CGIC is looking for a SME for each of the 3 modules. Each module consists of a study guide, PowerPoint (PPT) slides and assessment. The work required would be as follows:

1. Review the Study Guides and, if necessary:
 - a. Amend the Study Guide to include learning objectives, current trends, and information.
 - b. Development of an appropriate case study with recommended answers (equivalent to a marking scheme so that any instructor would know what they should be seeing from the responding groups) for each module.
 - c. Ensure that the content is updated to make it practical for the needs of the boardroom and for those participants who do not have a subject specific background.
 - d. Format the Study Guide with an executive summary and supporting information provided as additional appendices where appropriate and not infringing copyright. Add appropriate pictures and diagrams that do not infringe copyright.
2. Review PPTs, and if necessary:
 - a. Refresh to support and connect directly to the study guides.
 - b. Each PowerPoint slide should have one main idea, a maximum of 5-7 bullet points, and a maximum of 5-7 words per bullet.
 - c. Incorporate “session specific slides” for facilitator customization (trends, “in the news” and session outcome slides), ensuring the rest of the slide deck remains static until a future review.
 - d. Identify any appropriate videos that may supplement the presentation.
 - e. Extensive Speaker notes must be provided for each slide allowing any knowledgeable subject matter expert to present.
 - f. Images as appropriate, please use royalty free sites such as pixabay. If you would like to purchase stock, please contact the David Miriguay.
 - g. Provide a Teaching Map indicating the pace required for slides and activities for all instructors (template will be provided).
3. Review Assessments, and if necessary:
 - a. Refresh assessments to ensure they are a high level of rigour to support certification and are appropriate to assess that candidates have achieved the required learning objectives.
 - b. Only one assessment version is used per module, regardless of the facilitator.
 - c. Ensure wording is clear and that the questions accurately reflect the materials.
 - d. Provide a marking scheme to mark the assessments.

4. Identify what materials would be considered “core” as well as what could be removed and replaced with other materials to reflect the interest of participants from the two additional sectors identified.

4.0 – Project Timelines

The following timelines are being proposed for this project.

- Deadline for responses to the Request for Proposal: April 30, 2022
- Review and selection of successful bidder: May 15, 2022
- Submission of the first draft of the updated study guide with tracked changes: September 1, 2022
- Submission of final draft of the updated study guide: October 31, 2022

Preference may be given to those proposals that include a completion date prior to the one suggested above.

5.0 – Information About the Individual(s) Required of a Respondent to this Request for Proposal

All responses to this proposal should include the following:

- The individual(s) who will be working on the project including a brief biography/qualification. Any past writing experience or similar project experience would be considered an asset.
- Approach to the project.
- Proposed fees for the Review and Update of the current materials, if necessary.
- Proposed fees for the development of materials for the identified markets; and,
- Proposed timeline if different from the one proposed within the request for proposal.

6.0 – Request for Proposal Selection Process

All proposals will be reviewed by The CGIC’s Subject Advisory Committee and the Director of Education.

The following factors will be considered when assessing your submission:

- a. Individual(s) expertise in the subject area.
- b. Previous experience with similar projects and/or writing experience.
- c. Proposed fees; and,
- d. Proposed timeline if different from the one included within this request for proposal. *Please note, The CGIC would prefer to have the project completed as quickly as possible but will accept alternative options if presented with them.*