



Request for Proposals

Performance Measurement Analysis and Framework for CEC Outreach and Communications

Commission for Environmental Cooperation

2020

The Commission for Environmental Cooperation (CEC) is requesting proposals from prospective consultants related to strengthening the CEC's performance measurement framework for communications and outreach activities.

The Commission for Environmental Cooperation (CEC) was established in 1994 by the governments of Canada, Mexico and the United States through the North American Agreement on Environmental Cooperation, a parallel environmental agreement to NAFTA. As of 2020, the CEC is recognized and maintained by the Environmental Cooperation Agreement, parallel to the new Free Trade Agreement of North America. The CEC brings together a wide range of stakeholders, including the general public, Indigenous People, youth, nongovernmental organizations, academia, and the business sector, to seek solutions to protect North America's shared environment while supporting sustainable development for the benefit of present and future generations. Find out more at: www.cec.org.

Terms of Reference

A. Overview and Scope

The CEC's communications and outreach units are responsible for meeting institutional objectives related to:

1. Increasing the visibility and public awareness of the organization
2. Being a prime information portal for North American environmental data and analysis
3. Promoting diverse and inclusive public engagement
4. Being a model of collaboration and success

In order to meet these objectives, a strong performance measurement framework is required to ensure we are proactively responding to data internally as well as showcasing results to core external stakeholders.

The CEC is seeking a consultant with communications and outreach expertise to help design robust performance measures for both units that will include:

1. Conduct needs assessment interviews
2. Analyze existing performance measurement platforms and data
3. Support the design of an effective and practical reporting framework for both Communications and Outreach Units, including recommendations on additional key performance indicators, innovative tools and timelines
4. Optimize back-end analytics dashboards
5. Make suggestions for the future training of CEC staff
6. Conduct training of CEC staff, if presently needed

B. Description of services

December 2020 – January 2021

1. Conduct needs assessment interviews with CEC Secretariat Staff, including:
 - Communications Head of Unit
 - Communications Coordinator
 - Social Media Coordinator
 - Publications Administrative Coordinator
 - Outreach and Partnerships Officer
 - Director of Government Relations, Strategy and Performance

Deliverable: Brief report on interview results and conclusions drawn

2. Analyze existing performance measurement framework, including:
 - Reviewing current institutional-level quarterly performance measurement rubric
 - Assessing existing platforms supporting performance measurement (e.g., Meltwater, Google Analytics, Mailchimp, meeting surveys) and staff capacity for performance measurement
 - Analyzing existing CEC audiences across a variety of platforms

February 2021

3. Support the design of an effective and practical reporting framework for both communications and outreach units, including recommendations on additional key performance indicators, innovative tools, and timelines, including:
 - Analyzing the most common conversion paths users take to hitting our goals (e.g., subscribe to our newsletter, read a report, visit our website, attend an event)
 - Support in identifying KPIs that assist reaching communications and outreach objectives envisaged under the 2021–2022 Operational Plan
 - Support in identifying internal KPIs to be tracked on a weekly and campaign basis and create report templates
 - Support in identifying tools to gather feedback and compile data to assess level of satisfaction (e.g., surveys after events, campaigns, etc.) and create templates
 - Optimizing the backend and/or suggest training/optimization across platforms (Meltwater, Mailchimp, Google Analytics, Social Media)

- Recommending social media analytics software that meets our needs

Deliverables:

- Workshop with CEC Communications and Outreach Units to work together to set KPIs (objectives & deliverables have already been defined)
- Creation of visually appealing, fillable weekly and campaign report templates
- Optimization/suggestions on how to use backend of platforms and retargeting tactics to assist in meeting objectives as well as creation of dashboards, if applicable (i.e., Facebook pixel, Mailchimp open rate)
- Final report outlining: results of interviews, analysis of existing framework, analysis of conversion paths, KPI recommendations, survey templates, analytics software recommendations and training
- Set up and provide training for CEC Secretariat staff on any new backend dashboards or software required for future performance measurement needs recommendations. Hard costs related to external training services providers should not be included in the scope of consultant proposals and would be paid for separately by the CEC.

Quality of Deliverables

The consultant is responsible for providing deliverables **of publishable quality** (i.e., copy-edited prior to submission) in English and, when applicable, for the technical editing of the materials. The consultant will submit to the CEC Secretariat all written material (including complete drafts and final reports) in Microsoft Word, following the format of the CEC's [Report Template](#) and adhering to the precepts of the [Guidelines for CEC Documents and Information Products](#), as supplemented by the CEC's English [Style Guide](#). Supporting documents for tables, figures and maps will be submitted with the report in their original file format (e.g., Excel or ArcGIS). Note that all amounts shall be presented in metric units. The CEC Secretariat will be responsible, when applicable, for translation, printing, publication and distribution of products from this activity.

Upon delivery by the consultant of a final version of the report or other written materials under the project, the CEC reserves the right to a 15-business day period to review the document(s), notify the consultant of any potential issues or errors, and return the document(s) to the consultant for appropriate corrections, at no extra cost. In all cases, contract payments will be withheld if products submitted to the CEC fail to fulfill the quality and formatting requirements specified above. In the event that the consultant neglects to make the required corrections or if, following corrections, a deliverable remains unsatisfactory, the document shall be edited or revised by a third party designated by the Secretariat, the cost of which shall be deducted from the consultant's fees at a rate of C\$60 per hour.

Plagiarism

Plagiarism is the act of conveying someone else's original expression or creative ideas as one's own and can be a violation of copyright law. Neither intentional nor unintentional plagiarism is acceptable to the CEC. The consultant must follow good scholarly methodology in preparing reports and deliverables under the contract, including systematic referencing in footnotes or in-sentence references, for any secondary sources, quotations, data, etc., that do not originate with the author. Sources for tables and figures reproduced from other literature must be given in a "Source" attribution immediately below the table or figure. Failure to properly reference the

source of such borrowed material constitutes plagiarism and will be considered a breach of contract. For further information, see [Guidelines for CEC Documents and Information Products](#). In addition, for every written deliverable submitted, the Consultant must use iThenticate software, or an equivalent software approved by the Commission, to validate the written product in question and must forward the plagiarism review results to the CEC at the time of document submission. Contract payments will be retained if products do not fulfill these requirements.

Requirements

To be eligible for further consideration, all consultants must fulfill the following basic requirements.

The consultant, as well as all their personnel and subconsultants, must reside and be authorized to work legally in Canada, Mexico or the United States of America. If travel is required, the consultant must possess valid documentation to travel within these countries.

The consultant must have significant communications and outreach experience, including experience implementing 360-degree campaigns with multiple audiences and key performance indicators.

The consultant must have in-depth familiarity with a wide array of communications and outreach performance measurement platforms and software, including media monitoring, e-newsletter platforms, social media publishing and analytics software and Google Analytics.

The consultant must have in-depth experience with sophisticated marketing campaigns that are responsive to analytics such as A/B test e-blasts, the use of Facebook pixels and tracking conversions in Google Analytics.

The consultant must be fluent in both written and spoken English or French.

The proposal should not exceed three (3) pages, exclusive of applicant resume or corporate brochures. It should include a detailed cost breakdown, including number of person/days of key and other personnel, direct and indirect costs, travel costs and applicable taxes.

Potential consultants must also submit any additional information that will assist the CEC Secretariat in the evaluation of their proposal, such as samples of previous work and letters of recommendation from previous assignments. This information is not subject to the three (3) page limit.

The consultant deemed best qualified will be selected on the basis of a competitive process, in accordance with sections 2.5-2.7 of the [CEC Consultant Services Procurement Manual](#).

The CEC Secretariat intends to use its standard milestone-based contract for these services. A sample is available upon request.

The consultant will be paid in the following manner:

- Upon signature of contract (30%)
- Upon delivery of needs assessment report (20%)
- Upon completion of workshop, report templates, technical support and submission of final report (50%)

Payment shall be made only for *bona fide* consultant fees and legitimate expenses incurred in accordance with the contract for professional services, and only upon receipt and documented acceptance by the Secretariat of statement(s) of account/invoice(s) from the consultant. Settlement of invoices that are acceptable for payment will normally be made 30 days from the date of receipt by the Commission.

The budget for this activity will not exceed C\$40,000 (Canadian dollars), including professional fees and expenses. Reimbursable expenses are detailed in the CEC standard contract, available upon request.

For universities and nongovernmental organizations, note that the CEC accepts that overhead be charged for administration and other indirect costs up to 15% of the total value of the contract.

If the proposal were presented by a consultant established in Mexico, the applicable value-added tax will be 0%, in accordance with Article 29, section IV, paragraph a) of Mexico's VAT Act, as these are technical services that were engaged from abroad.

If a currency other than Canadian dollars is used, the consultant should indicate the total cost of the professional services in Canadian dollars as well as the currency of choice, for comparison purposes.

Conflict of Interest

"Conflict of interest" means, but is not limited to, a situation where a consultant's personal interest is sufficiently connected with professional duties under the contract, such that it results in a reasonable apprehension that said personal interest may influence the exercise of professional responsibilities under the contract. For example, a direct conflict of interest exists when the consultant is also a CEC government official, or is related to or closely affiliated with a CEC government official, CEC staff member or third party involved with the performance of the services.

The consultant will inform the CEC Secretariat of any circumstance that existed prior to the execution of this contract or that could manifest during the performance of this contract, which could constitute a conflict of interest. The consultant will complete and sign, on behalf of all his or her personnel, the attached *Declaration of Acceptance and Impartiality and Independence* (see Annex). The Consultant will also take note of the [CEC Consultant Services Procurement Manual](#).

Deadlines for Proposal Submission and Decision

The proposal, including all relevant attachments, must be received by the CEC Secretariat offices by **17:00 EST on 3 December 2020**. Proposals submitted after this deadline will not be considered.

Proposals must be submitted via e-mail to mainscow@cec.org. Proposal format may be in Microsoft Word or Adobe PDF format. Once the proposal has been submitted electronically, the CEC will confirm receipt within three business days. If receipt is not confirmed by e-mail within this time, **applicants must contact the CEC**. The contact person is:

Megan Ainscow
Head of Unit, Communications, Commission for Environmental Cooperation
700 de la Gauchetière St. West, Suite 1620
Montreal, Quebec, H3B 5M2
Phone: (514) 350-4300

The CEC Secretariat intends to select the consultant and notify the applicants within a reasonable period of time following the proposal submission deadline.

ANNEX (see also Schedule D in CEC standard contract)

CONSULTANT'S DECLARATION OF ACCEPTANCE AND IMPARTIALITY AND INDEPENDENCE FOR CONTRACT

I, the undersigned,

Last Name: _____ First Name: _____

ACCEPTANCE

hereby declare that I accept to serve as consultant in the subject contract.

IMPARTIALITY AND INDEPENDENCE

(If you accept to serve as a consultant, please check one of the two following boxes. The choice of which box to check will be determined after you have taken into account, inter alia, whether there exists any past or present relationship, direct or indirect, with any of the Parties to the North American Agreement on Environmental Cooperation ("NAAEC") or their Commission for Environmental Cooperation ("CEC") representatives, Secretariat staff, and/or third parties involved in the performance of this contract, whether financial, professional, familial, or of another kind and whether the nature of any such relationship is such that disclosure is called for pursuant to the criteria set out below. Any doubt should be resolved in favor of disclosure.)

I am impartial and independent with respect to the NAAEC Parties and their CEC representatives, CEC Secretariat staff, and third parties involved in the performance of this contract, and intend to remain so; to the best of my knowledge, there are no facts or circumstances, past or present that need be disclosed because they are likely to give rise to justifiable doubts as to my impartiality or independence, and that may constitute a conflict of interest.

OR

I am impartial and independent with respect to the NAAEC Parties and their CEC representatives, Secretariat staff, and/or third parties involved in the performance of this contract, and intend to remain so; **however**, I wish to call your attention to the following facts or circumstances which I hereafter disclose because they might be of such a nature as to give rise to justifiable doubts as to my impartiality or independence, and that may constitute a conflict of interest. Where facts or circumstances exist that might give rise to the latter such doubts, I may set out measures I intend to take to mitigate or eliminate any doubts regarding my impartiality and independence, and/or a possible conflict of interest. (Use separate sheet and attach.)

Date: _____

Signature: _____