Request for Proposals:
Content Development and Video Recording for e-Learning
Governance Literacy Training Modules
Submission Deadline: May 29, 2023

Fora: Network for Change is seeking a consultant with significant expertise, skills and experience in developing self-paced virtual learning courses around diverse, equitable and inclusive governance. The consultant will be responsible for using anti-racism and anti-oppression approaches in developing meaningful learning content, experiences and course evaluation tools. The consultant must be available to begin work in **mid-June 2023**, and complete work by **mid-July 2023**.

I. Background and Overview

About Fora
Launched in 2009 and operating as G(irls)20 from 2009 to 2021, Fora: Network for Change has been delivering programs and opportunities for young changemakers experiencing gender-based discrimination and working to make decision-making spaces more inclusive and equitable. Through renowned leadership, advocacy, and community-building programs, we help gender-marginalized youth gain new skills, confidence, networks and opportunities to build gender equity movements, advance in their careers, and change the status quo.
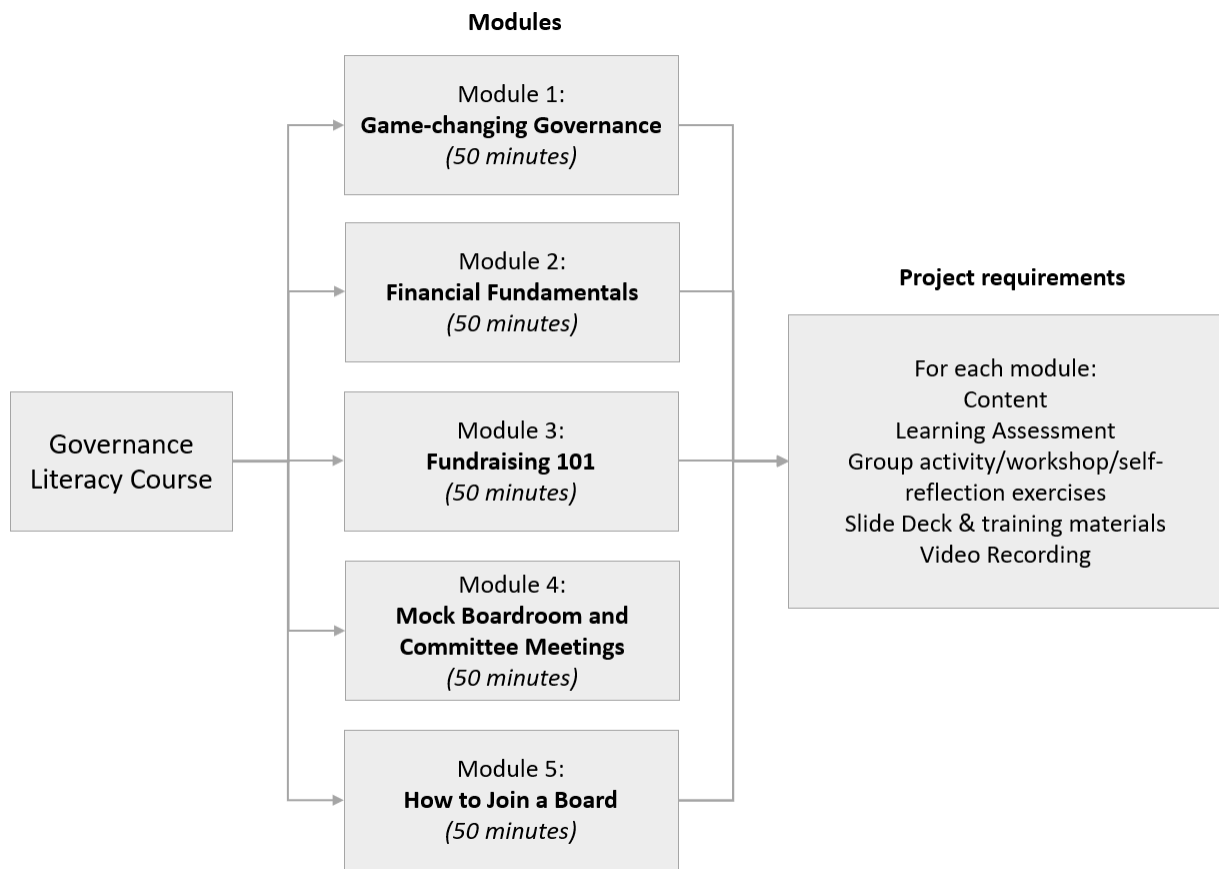
About Rise on Boards
One of Fora's signature programs, Rise on Boards, aims to change the status quo for young leaders at decision-making tables in boardrooms and communities across Canada. Every year, Fora recruits 35 emerging leaders who have demonstrated an interest in community development. Program participants (Young Directors) consist of women and gender-marginalized youth ages 18 to 25. Young Directors are trained in governance, financials, fundraising, communications, problem-solving, and leadership. Each Young Director is paired with a professional coach and board mentor to guide them in developing and reaching their personal and professional goals. After a series of technical and leadership trainings, Young Directors are placed on a non-profit governance board for one year.

Since 2017, the program has placed 170 Young Directors on boards in 9 provinces and trained an additional 350 people at Rise on Boards Leadership Forums. Following Fora's strategic plan for 2021 to 2025, the program aims to bring its transformative impact to more youth and governance boards across Canada and globally. Given this, the program is pilot testing an expansion model this year, called Rise on Boards+. The scaled model will be an entirely self-paced e-learning experience that will provide practical knowledge, tools, and guided support to empower youth with confidence, leadership, and governance skills to serve effectively as board directors.

Fora: Network for Change
401 Bay St., Suite 2100 Box #55, Toronto ON, M5H 2Y4
info@foranetwork.org
www.foranetwork.org

Project Description and Purpose

With its scaled model, the Rise on Boards program intends to strengthen the *Governance Literacy* training course offered for our program participants. The primary objective of the course is to ensure that the Young Directors are equipped with essential governance skills and are able to use efficiently the tools, strategies, and techniques they need to be in a non-profit governance boardroom.

The *Governance Literacy* course consists of five different eLearning modules: Game-changing Governance, Financial Fundamentals, Fundraising 101, Mock Boardroom and Committee Meetings, and How to Join a Board. The project aims to (i) design and develop the five eLearning modules; and (ii) video-record each module. Please refer to the diagram below for the course structure and the outputs required for this project, and **Annex 1** for the description and learning outcomes of each module.

Modules

Module 1:
Game-changing Governance
(50 minutes)

Module 2:
Financial Fundamentals
(50 minutes)

Project requirements

Governance Literacy Course

Module 3:
Fundraising 101
(50 minutes)

For each module:
Content
Learning Assessment
Group activity/workshop/self-reflection exercises
Slide Deck & training materials
Video Recording

Module 4:
Mock Boardroom and Committee Meetings
(50 minutes)

Module 5:
How to Join a Board
(50 minutes)

II. Role and Scope of Work

Fora is seeking the support of a consultant to work collaboratively with the Rise on Boards program team to use Fora's existing content for each of the modules as a guide to plan, design, and develop the following training module content:

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Scope 1: Content Development
- Work with subject matter experts to design and create a 50-minute training content on Game-changing Governance, Financial Fundamentals, Fundraising 101, Mock Boardroom and Committee Meetings, and How to Join a Board.
- The training content should be supported by learning materials such as curriculum, session agenda, PowerPoint deck, list of resources, links to references, quizzes, workshop activities & toolkits, pre- and post-training surveys.

Scope 2: Video recording/Pre-recorded lecture
- Record the 50-minute videos with transcriptions.
  - Specifics:
    - Length of learning experience: 45 to 50 minutes per module (can be broken down into shorter lessons)
    - Level and type of interactions: include links to video clips, photos/icons/images related to the content and scenarios/case studies and short quizzes; use PowerPoint animation effects when necessary.
    - Videos will be uploaded to Fora's learning platform (i.e., LearnWorlds)
    - Direction for recording specifics (i.e., recording software to be used, type of background, etc.) will be provided during the first consultative meeting.

III. Project Deliverables and Timeline

Please note that the activities and timeline below could be subject to change at the discretion of the program.

Activities/Deliverables	Target Dates
Kick-off meeting with the Rise on Boards program team	June 20, 2023
Consultative meetings during the content design and development stage	Between June 21 to 30, 2023
Finalization of module content and learning materials	Between July 1 to 9, 2023
Submission of all training/learning materials for the modules • Content • Learning Assessment (Pre- and post-training survey) • PowerPoint deck with speaker notes, list of resources and links to references • Group activity, workshop, self-reflection	July 10, 2023

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exercises • Other learning materials	
Recording of the 50-minute video with transcriptions	July 11 to 28, 2023
Submission of video recording/pre-recorded lecture	July 31, 2023
12th and 18th month content refinement based on participant feedback (i.e., refinement of quizzes, handouts, updates to governance concepts and terminology, etc.).	To be determined with the program team

IV. Eligibility Criteria and Evaluation

The consultant(s) must meet the following criteria:

- 5 to 7 years of experience in virtual training design, development, administration, delivery, and assessment.
- 3 to 5 years of experience in developing and facilitating training courses about Governance, Management of Non-Profit Boards, Financial Management, and Fundraising or similar alternative.
- 2 to 3 years of experience in developing eLearning modules.
- Experience collaborating on projects such as staff training programs or similar capacity-building initiatives in the non-profit sector.
- Advanced skills in working with digital technologies to record virtual training materials (i.e., using recording software, recording good quality audio and video, transcriptions, etc.).
- Intermediate knowledge of learning technology platforms
- Experience working with diverse groups and individuals from marginalized communities.
- Advanced knowledge in non-profit board functions or experience in board facilitation
- Located in Canada

Selection will be based on the consultant's:
- Expertise, prior experience, work samples and client references
- Proposed overall approach and management of this project
- Proposed learning solution and approaches in developing the training courses and content
- Strategies outlined in delivering and engaging the program participants through an e-learning module
- Relevance of the proposed content to the needs of the Rise on Boards program participants
- Proposed cost delineated by major deliverables of the project

V. Proposal Outline

Please ensure proposals include the following:
- Description of the proponent/firm and qualifications
    - Brief description of the individual or firm's profile, prior and current activities or projects focusing on services related to this project's scope.
- Proposed approach, methodology, timing and outputs
    - This section should demonstrate the proponent's approach to addressing the requirements indicated in the project's scope, deliverables and timeline.
    - Describe the proposed approach in developing the eLearning modules' content and materials.
    - Include the profile of the training developer/subject matter expert and their qualifications.
- Budget breakdown and workplan overview
    - Indicate the proposed cost delineated by the services and major deliverables of the project.
- Payment terms
- Two references
    - Include the contact's name, title, organization name, phone and email address, and the services you provided to this client.
- Link to samples of recorded sessions and/or e-learning modules created
- City and country in which consultant(s) is/are based; and
- Are no more than 6 pages

VI. Remuneration

Consultants are to propose a detailed project budget, which should not exceed $12,000.00 CAD, inclusive of tax.

VII. General Terms and Conditions

Ownership and copyright of all data, drafts, and final products will be Fora's sole and exclusive property.

VIII. Important Dates and Deadlines

May 29 - Proposals must be submitted no later than **11:59 pm EST via this form.**
June 1 to 15 - Internal review of proposals and scheduling calls for clarification
June 16 - Applicants will be notified on the status of their proposals
June 20 - Kick-off meeting

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IX. How to Apply

To apply, please provide us with a completed RFP application form with the attached proposal.

X. Connect with Us

For further questions, contact: Senior Programs Officer, Pam Galenzoga, at pam.galenzoga@foranetwork.org.

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Annex 1

Module 1: Game-changing Governance	
Description	*Navigate non-profit board governance by learning about the essentials of the roles and responsibilities of a board of directors, how to conduct board operations, and an overview of different governance models. Participants will gain a comprehensive understanding of a board's duties in directing the mission and vision of an organization, including strategic planning and risk management.*
Learning Outcomes	• Understand the responsibilities of a board of directors, including establishing the organizations' purpose, setting the pace for progress, compliance and oversight, continuity, and identity.
	• Understand the complex nature of governance and the different types of boards, including governance, administrative, and operations (management) board.
	• Learn how to be an effective director by getting to know the corporation, understanding the importance of constating documents, and learning about duties and liabilities.
	• Understand the core operations of a board: forming a board of directors, records and books, overview of board meeting activities, expectations, and requirements, due diligence and judgement, committees, annual and regular board tasks.
	• Learn about the strategic planning process and how strategic plans get approved.
	• Learn about risk management and what the common considerations are in a risk management plan.

Module 2: Financial Fundamentals	
Description	*Learn the basics of organizational finances, including how to read non-profit financial statements and budgets. Develop the foundational knowledge to ask the right questions as a new board director to understand the implications of financial decisions and actions on the organization.*
Learning Outcomes	• Demystify organizational finances by learning to "read" (understand) financial statements and budgets, including annual budgets, timeframes and responsibilities associated with reviewing budget actuals, annual audited financial statements, as well as learning about the approval process for budgets and financials.
	• Understand the role of the Treasurer.
	• Learn how to assess the financial health of the organization.

Module 3: Fundraising 101	
Description	*Non-profit organizations rely on funding from a variety of sources to make their work possible. Fundraising 101 will help you understand the basics of*

	private fundraising in the non-profit sector, how the organization whose board you serve on may generate funding to support its operations, and what your role will be as a board member in your organization's fundraising work. As organizations who rely on the support of others to make their work possible, fundraising can occasionally prioritize revenue over the best interests of the organization's own program participants or target service audience. As you learn the basics of fundraising, you'll also learn how to identify when there is a disconnect between who is being centered in your organization's storytelling and fundraising efforts, and the organization's goal of accomplishing its mission.
Learning Outcomes	• Define the purpose of fundraising for non-profit organizations. • Identify and define the different donor portfolios many organizations target. • Have a clear understanding of dignified storytelling and the connection to an organization's mission. • Distinguish between donor-centric and community-centric fundraising. • Understand the role of board members in an organization's fundraising efforts.

Module 4: Mock Boardroom and Committee Meetings	
Description	*What actually happens in a board meeting? How do motions work? What are Robert's Rules of Order? This workshop will provide a trial run of your first meeting, including an overview of how to effectively prepare for meetings, and the procedures of board meetings and committee work, so participants can go in to their first meetings feeling confident, prepared, and ready to participate.*
Learning Outcomes	• Understand what to expect in in-person versus virtual board meetings, including board meeting etiquette and responsibilities. • Walk-through board meeting procedures, with example scripts used by board members to guide the meeting. • Learn about the contents of a board package, and what to do with the materials. • Learn about the different types of board committees, their roles and responsibilities. • Understanding of the types of board-level situations that arise, considerations and decision-making processes, by working through mock scenarios.

Module 5: How to Join a Board	
Description	*Gain a better understanding of what to consider in looking for, selecting and joining a board to enhance your chances of landing a board position. This module will also provide tips on preparing yourself to join and help you anticipate potential challenges in finding, vetting and joining your*

	prospective boards.
Learning Outcomes	• Understand how non-profit boards typically recruit volunteers for governance.
	• Determine what factors to consider in looking for your prospective boards.
	• Learn to position and prepare yourself for board membership/placement.
	• Learn the various ways to find governance opportunities (through an online search, cold outreach and networking) and reach out to your boards of interest.
	• Learn the common barriers facing emerging leaders in joining boards and practical strategies for overcoming those barriers.