Request for Proposal
Learning Pathway and Course Development

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Background

The International Association for Public Participation (IAP2) is undertaking a global change initiative designed to deliver a strong International organisation and strong regional bodies.

As part of the global change initiative, the International Board established the Global Practice Development Committee (GPDC), whose purpose is to support the ongoing development of the practice. Among the tasks assigned to the GPDC is development of a coherent, integrated set of IAP2-branded courses that builds off the courses already offered by IAP2 at the international and/or regional levels.

There are currently two IAP2-branded 5-day entry-level programs being delivered in the marketplace that offer skills and understanding in public participation/engagement: the Foundations in Public Participation course and the Certificate of Engagement course.

This Request for Proposal (RFP) supports the GPDC’s objectives to

1. Develop an integrated learning pathway that articulate the development of a professional from entry level to advanced standing
2. Develop a single, entry-level, IAP2-branded program that is suitable for delivery across all IAP2 markets.
3. Develop a suite of complementary programs and modules that extend the learning beyond the entry level

Given the need to bring certainty and minimal disruption to the marketplace in a time efficient way, the GDPC is proposing the program development process takes place in two stages.

STAGE ONE (THIS RFP)

1. Develop an integrated learning pathway (from entry level to advanced)
2. Map all existing IAP2-branded courses/modules to the learning pathway
   ○ Note: this may not be needed as an output as it is more a process step towards the other outputs
3. Recommend a duration and approach for participants to complete their entry level training
   ○ Eg: fixed modules, a choice of elective or a blend of the two
4. Develop a full curriculum and learning products for the entry level program
   ○ Ie; Drawing from the 2 Foundations courses and the 7 Australasian Certificate courses
5. Align the learning products for ALL remaining course and place them along the learning pathway
   ○ Ie: SDOOP, Decision Makers, Building Engaging Organisations, Strategies for Complex Engagement, etc
6. Recommend a review cycle and process for all course
7. Recommend the transition Matrix for people seeking to articulate from previous courses to the new learning pathway
8. Graphic design of all materials
NOTE: The targeted “Go-live” for this work is 1 July 2020, but we invite any methodologies that enable it to be completed earlier.

‘Go-live’ means the new programs are piloted, trainers transition to new content complete* and courses ready to be delivered in the public domain

*trainer transition is not part of this RFP’s deliverable but timing would need to allow for this to occur

There are a number of important elements that will follow from this work but are NOT part of this RFP

1. The translation materials in languages other than english
   a. French, Spanish, Bahasa Indonesian and Italian
2. The development of the transition and upskilled process for existing trainers
3. The development of the transition process for regions defined and implemented
4. The establishment of a process for continuous review of all programs and modules
Deliverables

This RFP is seeking the skills of individuals or a team to:

1. Develop an integrated learning pathway

   ■ This pathway would draw on the Core Competencies developed for IAP2 Canada’s and IAP2 USA’s Professional Certification programs. Copies of the Core Competencies are available on the IAP2 Canada and IAP2 USA websites at https://iap2canada.ca/certification/ and https://iap2usa.org/certification/
   ■ The pathway will articulate the required skills, knowledge, and learning requirements for engagement professionals from entry level to advanced.
   ■ The learning pathway and program outline will need to document the underpinning theory, design and development thinking behind the pathway and program materials to guide the training of trainers. This would include but be limited to:
      ■ Links to any reference materials and literature used in the development
      ■ an overview of how the all materials fit together and provide a coherent and learning program;
      ■ The delivery pathways for a participant and module linkages
      ■ The overall program and module aims, outcomes and methodology
      ■ instructions for trainers in overall program delivery

Note: The licensing process and content will be developed separately from this contract by IAP2 but this RFP should allow, as part of this contract, time to share your thinking and rationale for learning pathway and curriculum development as part of the trainer licensing process. Mostly likely via an online platform, that will be recorded and used for other licensing sessions.
2. Map all existing IAP2-branded courses/modules to the learning pathway

- The map will show where each course fits on the learning pathway.
  - Note: There is some pre-existing work that explores the differences and similarities between the two programs, that can be provided to the successful applicant.

- **Foundations Courses**
  - Planning for Effective Public Participation (3 days)
  - Techniques for Effective Public Participation (2 days).

- **Australasian Certificate of Engagement Courses**
  - Engagement Essentials (1 day)
  - Engagement Design (2 days)
  - Engagement Methods (2 days)
  - Engagement Facilitation (1 day)
  - Engagement Evaluation (1 day)
  - Conflict in Engagement (1 day)
  - Engaging with Influence (1 day)

- **Additional Modules and Courses**
  - Strategies for Opposition and Outrage (2 Days)
  - Building Engaging Organisations (1 Day)
  - Decision Makers (½ Day / 1 Day)
  - Strategies for Complex Engagement (2 Days)

**Note:** There are existing short courses developed by IAP2 regions that are not part of the RFP process.

3. Recommend a duration and approach for participants to complete their entry level and advanced training

- Suggest both the number of days for the entry level course and the optimal way to structure the learning eg: delivery of a set of fixed modules, the choice from a series of elective or a blend of the two approaches
4. Develop a full curriculum and program for the entry level program

- This will include: program outline, participant manuals, facilitator session plans and notes, powerpoint deck, activities, core examples, scenarios and case studies.
  - A bank of Regional-specific case studies will be added over time, but is not part of this RFP.
- The entry level program can draw on any or all of the current suite of programs and modules
- While, there is currently no formal assessment of the current training programs, this RFP is seeking recommendations for potential assessments for each course and the program as a whole.

5. Align the learning products for ALL remaining courses and place them along the learning pathway

- Demonstrate how existing modules could be combined to form more advanced pathways for participant learning.
- Recommend additional modules that could be developed in the future
- All existing courses will be aligned and have a module outline, participant manuals, facilitator session plans and notes, powerpoint deck, activities, core examples, scenarios and case studies.
  - Ie: SDOOP, Engagement for Decision Makers, Building Engaging Organisations, Strategies for Complex Engagement, etc
6. Recommend a review cycle and process for all courses

- Create a logical, well-spaced cycle for the continuous improvement of course content and delivery tools
- The review cycle will enable both minor and major reviews and represent a staged approach across all modules to ensure the work load is evenly spread across a number of years.
- The review cycle would include but not be limited to market analysis, emerging literature on best practice engagement and/or adult learning approaches, course participant, input from IAP2 members, regions and trainers

7. Recommend the transition Matrix for people seeking to articulate from previous programs and courses to the new learning pathway

- The matrix will show how people at various stages of completion of the existing programs and modules will be recognised and/or transitioned to the new learning pathway
- The transition will also give consideration for handling existing courses that have been advertised and/or contracted for delivery

8. Graphic design of all materials

- Ensure all materials are graphically designed to meet the IAP2 Corporate Identity & Graphic Standard Guidelines and deliver tertiary-level professional presentation standards, including the development of a ‘family’ of models/images for program content
- Access will be given to existing IAP2 graphic elements such as images, objects, diagrams etc
- There is no requirement to use a graphic designer that had worked for IAP2, as long as the selected provided delivers to the IAP2 Corporate Identity & Graphic Standard Guidelines and deliver tertiary-level professional presentation standards
- An additional $10,000USD has been added to the project budget for this deliverable
Standards to apply

As an overall quality assurance checklist, the expectation is that all learning products developed must present:

- The leading contemporary theory and practise in public participation;
- Offer participants a high quality adult learning experience;
- Are applicable to a diverse range of sectors and cultural contexts;
- Considers digital learning where appropriate
- Clarify what competencies must be covered in each course and what content;
- Are open for regional or trainer customisation; and
- Are a commercially viable suite of learning products

Principles Based decision making

The GPDC operates on principle based decision making and has determined the following principles that should guide the respondents recommended methodology and work product.

**Decision-making principles**
1. Maintain (and grow) the goodwill of the change journey
2. Encourages innovation and collaboration across regions
3. Results in strong regions and strong international associations
4. Offers a pathway that is scalable and replicable
5. Consistent with core values, quality standards and the IAP2 brand
6. Contributes to simplified systems and resources that can be broadly applied
7. Supports and engages trainers and participants through the transition
8. Contributes to ongoing collaborative relationships with trainers
9. Contributes to forward progress in alignment with the broader change initiative
10. Builds a solid foundation for the future, while not waiting for it to be perfect
11. Content represents best of modern practise
12. Responsive to local need/demand
Governance

**Boards:** Approvals of EOIs, expenditure, business case, final approval of products rest with the IAP2 International and Regional Boards

**GPDC:** Oversight of this project and makes recommendations to Board, approvals

**Working Party:** A team of GPDC members that will provide project oversight.

**PDMs:** Both the International and Australisian Associations have Professional Development Managers, who play a key role in ensuring the work product aligns with the organisation Core Values and Objectives.

**Core Development Group:** This is YOU, the arms and legs of this important project. The expectation is that this core group has the following skills/experience;

- **Project Management:**
  - High level project management to bring the project in on time to standards/expected outcomes

- **Instructional Design:** expertise in developing competency and curriculum frameworks, program and course design expertise:
  - Competency framework and competency development skills
  - Instructional design and program/course development skills
  - Able to work closely with Subject Matter Experts to develop programs

- **Subject Matter Expertise:** bring engagement knowledge and experience to development
  - Significant engagement experience across a broad range of sectors at a senior level
  - Experience with design and delivery in multicultural and multilingual contexts
  - Able to work closely with an instructional designer to develop programs/courses
  - Understanding of the design and development process (desirable)

- **PDM/s:** The PDMs will provide the link between the core development group and the organisations. They will assist with advice, ensuring consistency of language, alignment to the operating context of IAP2 and building a Resource Library of existing materials.

Reporting

While contact with the GPDC working party will be ongoing, a minimum monthly update will be required to support IAP2’s communication with International and regional boards, IAP2 members and trainers
Anticipated Consultation

Maintain the goodwill and momentum of the broader change initiative is a critical element of this RFP. Getting it done, without bringing various stakeholders with us is not an option.

It is expected that consulting with key stakeholders during the project will be critical to the project’s success. We anticipate at least three key stakeholder groups would be consulted during the development process:

- **Key Advisors**: The GPDC can support the RFP by developing group of volunteers willing to assist the Core Development Group to ensure their work has the required understanding of
  - The underpinning theories and context used in the development of both original programs
  - The range of contexts in which the new program will be delivered

  IAP2 would initiate and manage an expression of interest process if the successful provider feels there is value in this approach.

- **IAP2 Licensed Trainers**:  
  - There are 46 International (n27+two who are also AU trainers) and Australasian (n19) Trainers that are key stakeholders in this process. Work has begun on the establishment of a trainer collaborative, which would be a mechanism for support consultation. This may be a consultation vehicle used by the providers of this RFP.

- **Regional and International Boards**: As the key stakeholders and ultimate decision makers, from a governance point of view, the process needs to ensure the Boards are well informed and supported with the decision making they will need to take during the process.

We are expecting a broader and more detailed engagement during the ongoing review and development process, which would include the broader IAP2 membership, past course participants, and emerging regions.
Selection Criteria

The development team will be compiled to represent the following perspectives:

- Depth and breadth of experience with
  ○ Public participation engagement in a range of contexts and sectors
  ○ Development, delivery and assessment of adult learning programs in a range of contexts and sectors
  ○ A competency based approach to adult learning
- Project management skills
- Willingness to work with a team pooled from different applicants to achieve the optimal blend of skills and experience (if required)
- Delivery of the maximum value for the available budget

The EoIs will be evaluated on the following basis:

- Demonstrated ability to deliver the required services on time 30%
- Relevant experience 30%
- Ability to work in a collaborative manner with IAP2 teams 20%
- Value for money 20%

IAP2 will select the proposal most favourable to the interests of the organization, and not necessarily the lowest cost proposal. Or, it may decide not to accept any proposal or to recommend a composite team of different applicants.

Budget

- A maximum budget of $65,000 USD is available for this RFP
  (this includes $10,000 USD for the graphic design deliverable added on November 29th)

Timelines

2019
December: 13th - Closing Date for RFQ - 5:00pm (Pacific Standard Time)
December: 16th - 23rd - Review of applicants and appointment of contract

2020
January - April: Project Commencement and Development
May: Release of pilot modules / Trainer transition and upskilling commences
June: Revision of pilot modules
July 1st: Go live

Updated 29th November 2019
Glossary of Terms

- **Competencies** – The overarching skills, knowledge, attitudes, beliefs, behaviours, and capabilities required for the industry context
- **Core Competencies** - The essential capabilities for a public participation/engagement professional to effectively design, implement, and evaluate public participation/engagement programs. The Core Competencies were developed, tested, and refined through an iterative process involving IAP2 members.
- **Learning Pathway** - the framework for how someone builds their competencies and progresses from “entry level” through to advanced practitioner
- **Curriculum** - A coherent, logical, and integrated framework of learning outcomes at all levels of the Pathway. The content and assessment that informs the development of the learning products, tools, and experiences that meet competency requirements.
- **Program**: The set of defined learning products, tools, and materials required to achieve learning as part of a curriculum.
- **Course / Module**: A discrete “chunk” of learning that makes up a program.

Contact

Contact Ellen Ernst, Executive Manager IAP2 for further information. Email your Proposals to operations@iap2.org

Review Panel

The RFP will be reviewed by members of the Global Practise Development Committee, supported by staff from bonding change, who are assisting with project management.

RFP Review Panel
- Kylie Cochrane - Presiding Member - IAP2 International
- Elisabeth Ellis- Professional Development Manager - IAP2 Australasia
- Anne Harding - Co Chair- Global Practise Development Committee
- Cassie Hemphill - Professional Development Manager - IAP2 International
- Joel Levin - Co Chair- Global Practise Development Committee
- Ellen Ernst - Executive Manager - IAP2 International

Intellectual Property

The successful tenderer will be required to sign an Agreement with IAP2, in which it will state that all Developed IP will be owned by IAP2 and that IAP2 will retain all proprietary rights and interests in and to its Background IP and Developed IP.
Appendix One - Description of Existing Modules

(Full course materials will be provided to the successful respondent)

International Foundations Program

- Define public participation and understand its value, risks and benefits.
- Understand how to integrate public participation into decision-making processes.
- Design, deliver and evaluate effective public participation planning processes.
- Select appropriate techniques that align with public participation objectives.

Planning module:

- Understand and apply the IAP2 Foundations for effective public participation
- Articulate and assess the benefits and risks of integrating public participation into decision-making
- Develop appropriate public participation objectives that clarify the public's role and are aligned with and support the decision process
- Identify stakeholders and their needs and expectations, and select ways to effectively engage them in a decision process
- Develop and implement a comprehensive and effective public participation plan
- Integrate communication strategies to reach and engage the public and support the public participation process
- Evaluate public participation processes being used and outcomes achieved.

Techniques module:

- Understand key characteristics of a wide variety of traditional and emerging techniques and technologies
- Assess and select techniques to meet identified public participation objectives
- Modify and combine techniques to meet various objectives and circumstances
- Determine the skills and resources needed to use different techniques effectively.

Strategies for Dealing with Opposition and Outrage in P2

- Learned how to identify and assess outrage and its causes
- Learned how and when to implement strategies to reduce outrage, applying them in the planning of P2 and in the moment
- Practiced applying strategies and approaches to respond to and address outrage and emotion
- Come away with a new way of thinking and analyzing outrage, and with enhanced skills, knowledge and behaviors to apply in your next public engagement challenge.
Choose 5 days from the following options:

**Engagement Essentials** (pre-requisite course - 1 day)

+ **At least one of the following:**
  - Engagement Design (2 days)
  - **And/or**
  - Engagement Methods (2 days)

+ **Up to two of the following one day courses:**
  - Engaging with Influence
  - Conflict in Engagement
  - Engagement Facilitation
  - Engagement Evaluation

**Engagement Essentials:**

**Aim:** The aim of Engagement Essentials is to introduce the key concepts and process in IAP2 Australasia’s Engagement Model.

**Objectives:**
- Explore a contemporary model of community engagement
- Explore the role of the engagement practitioner
- Demonstrate understanding of the different uses of engagement
- Identify why, when and in what way to engage and what is successful engagement
- Determine the community and stakeholder factors that shape engagement

**Learning Outcome:** Understand the essential elements of a ‘best practice’ contemporary model for engagement and the next steps you, or your organisation, need to take.

**Engagement Design:**
Aim: The aim is to explore appropriate purpose and context for different engagement situations.

Objectives:
- Identify the purpose and context for engagement
- Examine the priorities of the community, stakeholders and organisations
- Examine how to reach and activate community and organisational participation

Learning Outcome: Know how to select and design an effective process.

Engagement Methods:

Aim: The aim is to develop skills in the implementation of key methods.

Objectives:
- Examine:
  - Method selection
  - Method design
  - Method delivery
  - Method engagement

Learning Outcome: Ensure that the necessary elements of a successful process are addressed.

Electives:

Conflict in Engagement: Conflict doesn’t have to be inevitable in an engagement process. You have a choice as to how to avoid tense situations and conversations if you have the knowledge and skills.

Engaging with Influence: Explore the ways to build your credibility to have influence within your organisation and for your engagement intent to be taken seriously.

Engagement Facilitation: Explore how to plan effectively for facilitation and develop a repertoire of skills, tools and methods.

Engagement Evaluation: Develop an evaluation plan, assess metrics, limitations and priorities in communication of results.

Additional Australasian Modules

Strategies for Complex Engagement

Strategies for Complex Engagement is a 2-day training module that will challenge the thinking of experienced community and stakeholder professionals, taking them on a “deep dive” into complex and challenging engagement.

The module will explore the characteristics of complex engagement, the root causes, potential strategies, and the implications of short-term and long-term engagement processes.
By the end of this module, participants will be able to:

- Demonstrate an understanding of the drivers of complexity
- Describe the characteristics of complexity within an engagement process
- Identify the key sources of complexity for an engagement process
- Understand and map how complexity may change across a project or an organisation over time
- Map how an organisation’s role may change over time, and identify the triggers and mechanisms for change
- Understand the range of strategies for dealing with complex engagement
- Demonstrate critical thinking in choosing strategies that are purposeful, context-appropriate, responsive and iterative, and which meet the Core Values
- Design an engagement plan which describes how strategies are used and when
- Demonstrate an ability to build robust engagement strategies
- Complete a risk management analysis
- Identify their role in complex engagement and their learning needs.

**Building an Engaging Organisation**

This two-day module is designed specifically for senior practitioners and managers responsible for the community engagement function in your organisation.

Learn how to build an organisation with engagement at the heart of how it does business. This module will assist you in developing a strategy to get your organisation started, or get it moving towards becoming an engaging organisation.

**Contents:**

- What is an engaging organisation from the perspective of external points of view
- How to move from where you are now to create a more engaging organisation, including:
  - What is your role as senior practitioners in doing that; and
  - How to create your organisation’s sustained approach to engagement.
- What is an engaging organisation
- Understanding your own organisation’s readiness to engage
- What’s changed in the engagement space
- Organisational drivers for change in how we look at engagement
- Foundations of an engaging organisation.
- Generating momentum and change
- The practitioner role
- Creating change from within
- Building an engaging organisation
- Planning your approach to change
- Action planning
- Creating your own action plan to implement a sustained approach to engagement across your organisation.