



## **1. Introduction**

The Planning Institute of British Columbia (PIBC) seeks to engage a qualified consulting firm to conduct a comprehensive Equity, Diversity, and Inclusion (EDI) Audit. This audit aims to evaluate PIBC's current practices, policies, and culture to identify areas of strength and opportunities for improvement in promoting justice, equity, diversity, and inclusion within the organization and its activities. This is supportive of PIBC's 2023 strategic objective to "pursue justice, equity, diversity, decolonization and inclusion".

## **Background**

PIBC is the professional association of planners in British Columbia and Yukon and has been dedicated to the advancement of the planning profession for more than 60 years. PIBC is the westernmost affiliate of the Canadian Institute of Planners (CIP) – the national association – and was incorporated in 1958 under the Society Act of British Columbia with just eight founding members. Today there are approximately 2,000 members, 11 Board members, 7 staff or appointed positions, and 11 committees.

For more information about PIBC, please visit <https://www.pibc.bc.ca/about-pibc>, [2023-2025 Strategic Priorities](#) and the [2023 PIBC Annual Report](#).

## **2. Objectives**

The primary objectives of the EDI Audit are to:

- Undertake a comprehensive assessment of the current state of EDI within PIBC (i.e. baseline analysis) with respect to the institute's:
  - Operations (policies, procedures, and practices); and
  - Membership, staff, and Board composition (e.g. demographics, identities, lived experiences).
- Identify gaps and barriers to EDI in the above;
- Understand the experience of staff, volunteers, members, and Board members with equity-denied identities (e.g. experiences of inclusion/exclusion, racism, discrimination, etc.);
- Provide actionable recommendations to enhance EDI across all aspects of PIBC's functions for the short-, medium- and long-term based on benchmarks from leading organizations;
- Determine how to integrate and respect the reflections, work and recommendations generated by the PIBC Planning Practice and Reconciliation Committee on "Exploring Pathways for Indigenous Planning Membership"; and
- Develop a framework for ongoing monitoring and evaluation of EDI initiatives.

### **3. Scope of Work**

The selected consultant will perform the following tasks:

#### **3.1. Pre-Audit Planning**

- Conduct an initial meeting with PIBC's leadership to understand the organization's structure, roles, and expectations for the audit.
- Develop a detailed project work plan, including timelines, milestones, and deliverables.
- Review relevant PIBC documents, including policies, procedures, bylaws, and previous EDI initiatives, including recommendations received by PIBC's Planning Practice and Reconciliation Committee in 2023-2025.

#### **3.2. Data Collection and Analysis**

- Identify available data related to EDI, including membership demographics, staff composition, award recipients, participants in PIBC events and training, and other relevant groups.
- Design and distribute surveys to PIBC members, staff, Board members, committee members, and other stakeholders (e.g., award recipients, event participants) to gather quantitative and qualitative data on EDI perceptions and experiences.
- Conduct focus groups and interviews with a diverse cross-section of members, staff, Board members, committee members and other contributors to gain deeper insights and gather perceptions of the organizational climate concerning EDI. Other stakeholders may include:
  - Planning professionals or students who are not members;
  - Former members who have voluntarily given up their membership within the past 1-3 years;
  - Prospective members.
- Analyze the collected data to:
  - Identify representation gaps among members, staff, leadership (Board, committees, etc.) and stakeholders.
  - Assess feelings of inclusion, belonging, and respect within the organization, ensuring there is support available for those who are divulging their experiences, and a clear understanding of next steps.
  - Identify disparities in experiences based on identity factors such as race, gender, age, disability, or other aspects of diversity.
  - Identify any existing barriers to a positive and inclusive organizational climate.
- Identify data gaps: Determine areas where additional data collection is necessary to provide a comprehensive assessment of EDI within PIBC.

### 3.3. Policy and Function Review

Evaluate PIBC's core functions, including policies, practices and procedures, through an EDI lens, including:

- **Administration:** Review oversight and administration for EDI considerations, including the availability and effectiveness of EDI training and professional development opportunities offered to the Board and staff, and existing feedback mechanisms for reporting and addressing EDI-related concerns.
- **Governance:** Assess governance and policy-making practices for inclusivity and fairness.
- **Outreach:** Evaluate outreach, engagement, and support activities to ensure they are inclusive and supportive of all members.
- **Communications:** Review communications activities, including publications, website, outreach, and media relations for diverse representation.
- **Code of Conduct:** Coordinate and consult with the Institute's Professional Conduct Review Committee (PCRC) to evaluate the administration of the Code of Professional Conduct and handling of misconduct complaints through an EDI perspective.
- **Membership and certification:** Review membership admission, certification standards, and university planning program accreditation for inclusivity.
- **Awards and Recognition:** Assess the inclusivity of awards and recognition programs.
- **Continuous Professional Learning (CPL) Program:** Evaluate the inclusivity of the continuous professional learning program and activities.
- **Student Internship Program:** Assess the oversight and implementation of the Student Internship Program for EDI considerations.
- **Events and Other Activities:** Assess other Institute activities such as Conferences, Events, and Chapter activities for inclusivity.

### 3.5. Benchmarking

- Compare PIBC's EDI practices with industry standards and best practices.
- Identify leading practices from other professional organizations and planning institutes.

### 3.6. Reporting and Recommendations

- Prepare a report summarizing the "Current State of EDI within PIBC" based on findings from data collection, policy and practices review, and benchmarking.
- Develop an "EDI Action Plan for PIBC" with short-term, medium-term, and long-term strategies for improvement.

- These actions are recommendations for addressing gaps and barriers and improving EDI policy for each of the institute's core functions and organizational culture.
- These recommendations should leverage best practices and innovative approaches as determined through the benchmarking process.
- This action plan should respect, refer to, and align with work and recommendations received through PIBC's Planning Practice and Reconciliation Committee in 2023-2025.

### **3.7. Framework for Ongoing Monitoring and Evaluation**

- Propose a framework for PIBC, including the future role for JEDDI, leadership, resources, capacity and staff, to monitor and evaluate the progress of EDI initiatives regularly.
- Suggest metrics and a streamlined number of key performance indicators (KPIs) to track EDI advancements.

## **4. Deliverables**

- Detailed project plan with timelines and milestones.
- Surveys, focus group guides, and interview protocols.
- Current State of EDI within PIBC.
- EDI Action Plan with recommendations.
- Framework for ongoing monitoring and evaluation.

## **5. Timeline**

The EDI Audit is expected to be completed within six months from the project's initiation. A detailed timeline with specific milestones will be developed in collaboration with PIBC during the pre-audit planning phase.

## **6. Consultant Qualifications**

The consulting firm should have:

- Proven experience conducting EDI audits for professional organizations.
- Expertise in EDI principles and best practices.
- Strong analytical, communication, and report-writing skills.
- Familiarity with the planning profession and related organizational structures is an asset.
- Demonstrated understanding of intersectionality, and anti-colonialism, and anti-ableism, and how these frameworks can be applied to the audit and to the institute.



A consultant team made up of professionals with a diversity of lived experiences and identities is strongly preferred.

## **7. Budget**

A detailed budget proposal, including a breakdown of costs for each phase of the audit, should be provided by the consulting firm.

## **8. Submission Requirements**

Interested consulting firms should submit the following:

- A cover letter expressing interest and summarizing qualifications.
- A proposal (not to exceed 20 pages, excluding key personnel resumes), with:
  - **Firm description:** Overview of your firm, including high level description of expertise and background, operating philosophy and key values. To help us understand your firm's values on Reconciliation, EDI, and sustainability, please answer the following:
    - How does your company help people feel like they belong at work? Please include any policies, practices, or other examples.
  - **Firm experience:** Summary of your firm's expertise as it relates to EDI audits, including identifying related projects that you have brought to full completion. Please include a reference contact for each project, completed and in process.
  - **Staff qualifications:** Provide the key personnel and/or subcontractors who are included in this proposal. Key personnel are those who will be the main contact or will play key roles in the project. For each key personnel member, please include:
    - a resume in the appendix, which includes employment history, experience, and relevant education and training; and
    - a description of the lived experiences, perspectives and identities they bring and how they may apply to this initiative.
  - **Proposed project work plan,** which should include approach, methodology, tasks, deliverables and timelines. Identify and describe any proposed deviations from the scope / requirements specified.
  - **Proposed project budget** broken out by task component.
  - **Other Information:** Any other details and information you consider relevant or applicable to this procurement and your proposal that have not been identified elsewhere.

## **9. Evaluation Criteria**

Proposals will be evaluated based on:



- **Qualifications and experience [35%]:**
  - Alignment of the firm's values with those of PIBC and this initiative.
  - Qualifications of the firm to undertake the project, based on past project experience.
  - Level of experience of key personnel relevant to this initiative.
  - Key personnel reflect a diversity of identities, lived experiences and intersectionality.
- **References [5%]:** References and previous client feedback.
- **Approach and Methodology [45%]:**
  - **Understanding of the project:** Demonstrated understanding of the project objectives and requirements.
  - **Approach:** Quality and feasibility of the proposed approach and methodology. Clearly outlined, and logical, tasks and deliverables.
  - **Staffing and Team:** Appropriateness of team size and roles, including any potential use of sub-contractors.
  - **Additional Offerings:** Value add or innovative offerings.
- **Cost/Budget [15%]:** Proponent's financial offer, as calculated using the following formula:
  - Lowest price proponent is awarded 5 points
  - $[\text{Lowest price}/\text{other proponent's price}] \times 100 / 20 = \# \text{ of points for other proponents}$

The evaluation process noted above will determine the prominent submission with the highest point score. PIBC may deem the Proponent with the highest point score to be the successful Proponent, or PIBC may conduct an interview with a minimum of two Proponents with the highest point scores.

Should PIBC choose to conduct interviews, the results and impressions from the interviews will be combined with the total point scores to determine which Proponent is deemed to be the successful Proponent.

PIBC will select, at its sole discretion, the Proponent that it determines is best suited to achieve the objectives for this work. Based on its evaluation and determination, PIBC reserves the right to, at its sole discretion, decline to proceed with any Proponent or submission received.

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PIBC looks forward to engaging a consulting firm that can help advance its commitment to equity, diversity, and inclusion.

Completed proposals should be submitted by **4 pm PT, February 28, 2025**, to Kelly Chan at [kelly.chan@pibc.bc.ca](mailto:kelly.chan@pibc.bc.ca).