

# ISAO Executive Director Request for Tender

November 2011

## **Introduction to ISAO**

The International Society of Arboriculture Ontario Inc. (ISAO) is a not for profit Chapter of the International Society of Arboriculture serving the needs of people interested in the health and care of trees. The Chapter has been in existence for over 50 years and has grown from membership numbers in the 50's to over 600. The International Society of Arboriculture grants specific locations Chapter status and they also provide guidance and organizational advice to the Chapter. The Chapter essentially runs independent of International and to accomplish this it has created a set of Constitutional By-Laws and Policy and Procedures to ensure that its organization runs smoothly and within the boundaries of the requirements of International.

The Mission Statement for ISAO is: "To enhance and promote the care and benefits of trees for present and future generations in Ontario through education, research and awareness" The Chapter attempts to fulfill this Mission by providing educational opportunities, newsletters and a source of research regarding arboricultural and urban forestry topics.

The Chapter is a volunteer organization with one paid contract service looking after our financial and administrative functions. The Chapter organization consists of 11 volunteer Board members with a single President to guide and support the Board. The organizational function of the Executive side of the Board is through a series of position rotations. The President position is rotated through the Board members and at this time is a two year appointment. The ISAO Executive Board contained with the Board structure consisting of a Vice President, Immediate Past President, a President Elect and a President. The flow of the structure has the President Elect for two years supporting and able to step in should the President not be able to fulfill their commitment. The President guides and supports the Board for two years. Once that President's term is completed, the President Elect moves into the President's position with the President moving to the Past President position. The Vice President is the only position that has not been moved through the organization. This position has traditionally been used as a source of continuity to ensure that the Chapter Executive has historical support and information in their decision making.

The Chapter has many volunteer committees that provide educational opportunities for our members as well as a source of fund raising. The committees typically have a Board liaison appointed to them plus a number of volunteers from the arboricultural community providing the human resources to do the work. For instance, the Educational Committee is responsible for putting on an annual conference, several yearly workshops and the Annual General Meeting. This committee is the main funds generator for the Chapter.

Another committee looks after the Tree Climb competition. This annual event is a great opportunity for the workers of the trade to show off their skills and competitive spirit as well as promote

the trade of arboriculture to the general public. All of these committees run on a volunteer basis and funds needed to run the events are approved through the Board.

ISAO also has an award winning newsletter published bimonthly. The newsletter presents the happenings within the Chapter as well as providing information related to the arboricultural field. This newsletter has won many Banner Awards from International. In addition, our webs site has been evolving and provides an excellent source for current information and forms to register for ISAO events.

The rationale for searching for an Executive Director is based on a Three Year Business Case developed for the Board and accepted by the Membership in which several recommendations to improve the Chapter were presented. The ISAO Board feels that the Chapter must increase its “foot print” in the arboricultural field by increasing its brand recognition within governmental and non-governmental organizations. In addition to brand recognition to organizations, the Board feels that the current number of members can be increased with the right marketing skills and consistency of approach. Finally, the spin off of increasing membership numbers will be more revenue coming into the Chapter, allowing for more opportunities to fund arboricultural activities and increase arborist’s participation in Chapter events. The position of Executive Director will give the Chapter a stable and consistent approach to marketing the Chapter which will in turn increase the membership numbers.

The content of Request for Tender:

- 1.0 Instruction to Bidders
- 2.0 Terms and Conditions
- 3.0 Specifications / Scope of Work
- 4.0 Format for Submission

All sections must be read by the Bidder. Submission of Tender will indicate that all sections have been read and understood. Modifications or amendments will be communicated to all Bidders via electronic mail. Tenders can be accessed through the ISAO website or can be distributed through the ISAO office and can be requested by calling 1-416-493-7022. Questions regarding the Tender content or process should be forward to Jake Zink at [j.zink@HydroOne.com](mailto:j.zink@HydroOne.com).

ISAO reserves the right to assess and determine the most appropriate contract. Lowest bidder will not necessarily be the chosen bid. ISAO reserves the right to cancel the Request for Tender, disqualify Bidders or to re-tender the document as it sees fit.

## **1.0 Instruction to Bidders**

The duration of this contract is for one (1) year with the possibility of extending to three years at the discretion of ISAO.

An evaluation team will review each bid and select potential candidates for further interview and assessment. The selection process will include a request for a criminal background report from the local police services (at the expense of the Bidder). You will be notified by the Selection Committee when this is required. The Committee will contact all references, and conduct investigation into previous projects completed and accreditations listed.

Unsuccessful Bidders will be notified by electronic message of their position as the process moves from the initial stages through to the final acceptance of a successful Bidder. ISAO reserves the right to accept or reject any or all bids and to re-tender as desired.

## **2.0 Terms and Conditions**

The Contractor will be responsible for submission of all taxation, follow all health and safety regulations, submit WSIB expenses and all other requirements needed while acting as an independent contractor. The Contractor is NOT an employee of ISAO and must not act and conduct in that fashion.

The Contractor may NOT sub-contract any work unless prior written approval is provided by ISAO (Contract Administrator) for this contract.

The duration of the ISAO Executive Director contract is one year, with a possibility of extending three years at the discretion of ISAO. . Bids submitted must provide costing for each year of the proposed contract. Extensions of contracts will be based on a year to year evaluation.

The successful Bidder will be evaluated yearly to determine if specific goals and achievements outlined in this contract have been achieved. ISAO will also conduct monthly informal evaluations plus a formal quarterly evaluation in which the Bidder will provide a status report indicating the number, name and results of all correspondences initiated to promote the Chapter. In addition the report will detail what other duties the Executive Director accomplished as outlined in the Specifications / Scope of Work.

Cancellation of the contract may occur at the discretion of either party provided written confirmation is received within 60 days of the desired contract cancellation date. The dissolution of the contract will require returning of all ISAO material, contact lists, assets, security codes and any other material that is related to the ISAO Executive Director contract. ISAO will pay out the contract to the month of dissolution.

All material held by the Executive Director must be treated with the highest level of confidentiality and security appropriate to the work. Phone lists, email lists, addresses and other private information of our members must not be sold or otherwise shared with anyone or any business.

The Executive Director will be the “face and initial contact” for most new and current ISAO members and any similar agencies. The expectation is that the Executive Director will conduct and deport themself in an appropriate fashion displaying the highest degree of professionalism in speech, dress, written correspondences and personal conduct becoming of the position.

The contractor will provide all materials, equipment and other devices needed to complete the contract including all office material (telephone, fax, office supplies etc), transportation requirements, meeting

space, presentation equipment and materials, contact lists, and all other equipment and services needed to fulfill the contract requirements. ISAO will provide to the Contractor a laptop computer, software and electronic information needed as required.

The successful Bidder will be paid in 12 monthly installments. The total bid for the approved year will be split into 12 equal payments. The successful Bidder will invoice to ISAO the total for that month indicating expenses, wages, all applicable taxes and total cost for the month.

### 3.0 Specifications / Scope of Work

The successful Bidder under the direction of the President or his/her delegate (ISAO Contract Administrator) will provide all necessary tools and equipment to provide the following services to ISAO:

Event	Estimated Days per Year
Two days per week providing Executive Director services promoting ISAO, increase membership numbers and ISAO brand recognition through; promoting ISAO Bookstore sales, returning ISAO correspondences email and phone calls, providing bimonthly newsletter articles, provide web site advice and project assistance, assist in ISAO event planning, building alliances and ISAO brand recognition with fellow “green industry” partners and government and non-governmental agencies, correspond with International as necessary and perform other duties as agreed to by the ISAO Contract Administrator and Contractor to satisfy the goals and objectives of ISAO	104
Attend one Annual Conference and AGM (attend and assist with speaker and logistics) and the International Conference 2013 in Toronto	4
Develop two ISAO Workshops and attend	2
Attend two days at Canada Blooms	2
Attend three days at Landscape Ontario Show	3
Attend three days with Tree Climb Competition meetings and event	3
Visit three Elementary and Secondary School per year promoting ISAO Mission	3
Visit three Post Secondary Schools delivering arboricultural courses to promote the ISAO Mission (Humber, SSFC, Lambton)	3
Attend one day Arbor Day Celebration event	1
Attend six Board of Director's Meetings to report on benchmarks and goals and advise as needed	6
Attend six Sub-Committee Meetings to advise and assist in meeting logistics	6
<b>Totals</b>	137

Attendance of events outside of those listed will be assessed and determined by the Contract Administrator through the ISAO Board to its value in promoting the Chapter goals and objectives. The Bidder should include a daily pricing for these types of events.

The benchmarks and goals set out by ISAO for the Executive Director are outlined below.

December 2012	Memberships: 60 new people Attendance Conference: 65 new people Bookstore Sales Increase: \$250/month Certification and OTCC Numbers Increase: \$24,000 Two Workshops Delivered: Promotion of ISAO through school visits and green industry events: Attending ISAO Board Meetings:
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**4.0 Format for Submission**

**4.1**

Total Cost for Contract per annum \_\_\_\_\_

**4.2** Daily rate (including mileage and all expenses) for events outside those noted above:

**4.3** Please provide curriculum vitae of previous educational experiences, work experience, accomplishments (work and personal), projects lead, positions held (work and volunteer), and accreditations, personal and business references as it pertains to the contract of ISAO Executive Director.

**4.4** Please provide a detailed summary of your past experiences and knowledge and how you feel this would contribute to your successful execution of the services we are requesting in this document.

**4.5** Do you have any restrictions / limitations to the work that you are tendering on i.e. International travel, medical?

Name of person submitting (please print) \_\_\_\_\_

Address \_\_\_\_\_

Telephone Number \_\_\_\_\_

Email Address \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

Please submit the completed tender to the ISA Ontario Head Office by February 29, 2012.