



Request for Proposal (RFP)

CONSULTANT SERVICES FOR THE REVIEW OF STRATEGIC PLAN

Issue Date: December 29th 2020

Organization Name: Kluane Community Development LP defined as "KCDLP"

Closing Date/Time: January 15th 2021

Category: Services

Region of Delivery: Yukon Territories

Tender Type: Request for Proposals (RFP)

Key Contact Person: Pat Titus, Executive Director
Kluane First Nation Community Development Corporation
Tel: (867) 841-4274 ext.251
Email: kcdc.ed@kluanecorp.ca

Introduction

The Kluane Community Development Limited Partnership (KDCLP) was established in 2011 with the mandate to provide economic development services to support local economic development and business growth for the Kluane First Nation (KCDLP) and its citizens.

KCDLP is seeking a contractor/firm to perform the services described in the Scope of Work included below as Appendix A. Interested and qualified companies/contractors are invited to submit proposals according to the terms and conditions included herein.

Purpose of RFP

KCDLP is seeking a qualified planner / facilitator to accomplish a review of the Strategic Plan as described in **Schedule A – Scope of Work** including but not limited to:

1. Review and assess the 2018 – 2020 KCDLP Strategic Plan “Creating Economic Resilience” with KCDLP board and management.
2. Design, plan, facilitate and conduct planning sessions with the Board of Directors, Management and Staff.
3. Facilitate consultation with KFN Citizens and KFN Corporate Working Group to establish an updated strategic plan for KCDLP including renewed goals for 2021 - 2023.



Guidance from Kluane Community Development Corporation

The primary contact for the project will be the Executive Director for Kluane Community Development Corporation. The Executive Director will assist with organizing, coordinating, and confirming the details for all meetings with the bidder and any additional consultants, contractors, etc.

Resources and Budget

1. KCDLP will be responsible for providing all equipment, materials, rooms, meals, and supplies for meetings held in Burwash Landing, Yukon Territory.
2. The bidder will be responsible for providing all equipment, materials, meals, and supplies for meetings held in Whitehorse, Yukon Territory, or any place other than Burwash Landing.
3. The budget for the Project will not exceed **\$25,000**. Proposals exceeding this amount shall not be accepted by KCDLP.

Governance

All final decisions will require the approval of KCDLP Board of Directors.

Schedule

The Project and related bids shall be subject to the following deadlines:

Deadline date	Action
◆ December 29 th , 2020	RFP made available to the bidders - Request for Proposal Scope of Work distributed to KFN Citizen Consultants
◆ January 5 th , 2021	Questions provided to KCDLP from bidders
◆ January 6 th , 2021	Response to all questions from bidders provided
◆ January 15 th , 2021,	Deadline for receiving bid (all material) - Proposals and Consultant's Curriculum Vitae submitted
◆ January 17 th , 2021	Bids to be evaluated.
◆ January 19 th , 2021	Contract awarded.



◆ January 21st, 2021	Negotiation of contract terms.
◆ January 22nd, 2021	Conclusion of contract.
◆ March 19 th , 2021	Completion of deliverable
◆ March 30 th , 2021	KCDLP provide final approval.

** These dates are subject to change. Bidders will be notified accordingly*

RFP Evaluation Process and Criteria

The bids assessment will be performed on a combination of Competence (40%) and Cost (50%) and Local Business Initiative (10%) as follows:

Competence 40%:

1. Highlight your experience, knowledge, and expertise of providing services of this nature
2. Explain the detailed process/methodology you will use to deliver our requirements

Cost 50%:

1. Provide a clear unit breakdown of all costs associated with the completion of Services

First Nations 10%:

KCDLP contractors or firms will obtain an additional 10% score. To be considered a KCDLP business, the following criteria must be met:

1. at least 51% of the firm must be owned and controlled by Indigenous peoples
2. if the firm has six or more full-time staff, at least a third of the employees must be Indigenous peoples
3. in the case of a joint-venture agreement, at least a third of the value of the work must be performed by an Indigenous business

RFP Requirements

The RFP will require the following information to be considered complete:



1. **Approach:** Recommended approach to complete the Project.
2. **Price:** Total costs including expenses for the consultant to complete the Project.
3. **Qualifications and Experience:** Please include in your submission all qualifications and experience relevant to this opportunity, including background information on all people who will be involved.
4. **Mandatory Requirements:**
 - Bidders must have a valid Workers Compensation scheme
 - All equipment must be insured
 - Bidders must have a safety plan for the services provided
5. **RFP Questions** – Bidders may submit any questions or request clarifications on any details of the RFP package, or elements specified in the procurement timeline. Questions and request for clarifications shall be submitted to:

[Executive Director:](#) Pat Titus

[Email:](mailto:kcdc.ed@kluanecorp.ca) kcdc.ed@kluanecorp.ca
6. **Assumptions** – Tenderers are free to make any assumptions necessary to enable them to submit a proposal, please clearly define these within the proposal. Please ensure you clearly list out all your pricing assumptions.

Submission of RFP - Guidelines

1. Technical Proposal

We require that responses to this RFP include the following information. Bidders are encouraged to use forms provided in **Schedule B – Technical Proposal Forms**.

- *Description of services:* Please include a detailed description of how the services will be performed including a work plan or schedule indicating the different phases required to complete the Services.
- *Completion Time:* Please indicate a schedule for the completion of the different phases of the project. Bidders must include an estimated number of hours required for the completion of the services.
- *Staff Requirements:* Describe the proposed team and provide information about the qualifications and expertise of each team member.
- *Company Information:* Please indicate the following information:
 - Date of Incorporation
 - Briefly describe your firm's history and Background (Include a short description of the company, location(s) and total number of employees)
 - If your firm has been subject to any lawsuits or settlements specific to
 - Provide proof that your company carries Errors and Omissions insurance coverage. general liability insurance or contractor's insurance
- *References:* Provide three references from current or past clients, preferably of similar size and/or need and complexity to KCDC. For each reference please include:
 - Length of servicing relationship



- Contact name, title, and phone number

2. Financial Proposal

Bidders are invited to submit a price breakdown of all costs associated with the completion of Services that includes the following elements:

- Labour: Indicate total hours indicating different rates if applicable to a variety of individuals participating in the project.
- Travel Costs
- Expenses for Meetings such as catering, rental of facilities, etc.
- Office Supplies and printing expenses

3. Contact Information

Proposals should be addressed to:

Executive Director: Pat Titus
Email: kcdc.ed@kluanecorp.ca

Completed RFP's must be submitted either by email, fax, mail, or in-person, addressed to:

Executive Director: Pat Titus
Kluane Community Development Corporation
PO Box 61
Burwash Landing, YT, Y0B 1V0
Tel: (867) 336-6282
Email: kcdc.ed@kluanecorp.ca

RFP Terms and Conditions

No Obligation to Proceed

This RFP does not commit KCDLP in any way to award a contract for the Project and KCDLP reserves the complete right to at any time reject all proposals and to terminate this RFP and the competitive selection process provided herein and proceed with the Project in some other manner in KCDLP's sole discretion.

No Contract

This RFP is neither an offer nor an agreement to purchase work, goods or services. No contract of any kind for work, goods or services whatsoever is formed under or arises from this RFP or as a result of or in connection with the submission of a proposal in response to this RFP until a formal contract for the Project is signed between KCDLP and the selected bidder.



No Obligation to Accept the Lowest Priced Proposal

KCDLCP will, at its discretion, award the contract to the responsible contactor submitting the best proposal that complies with the RFP. KCDLCP may, at its sole discretion, reject any or all proposals received or waive minor defects, irregularities, or informalities therein.

KCDLCP is under no obligation to accept the proposal containing the lowest cost for the Project. KCDLCP reserves the right to accept or reject any and all proposals, to revise the RFP, to request one or more re-submissions or clarification from one or more bidders, or to cancel the process in part or whole at any moment. Bidders are not obligated to respond to or to continue to respond to the RFP after the submission and closing date. We reserve the right to take the next-highest ranked submission(s) through to any stage of the RFP process in the event of a conflict of interest is identified.

Cost of Preparing the Proposal

Each bidder is solely responsible for all costs incurred in the preparation of its proposal in response to this RFP, including all costs of providing information requested by KCDLCP, attending meetings, and conducting due diligence.

Confidentiality of Information

All information pertaining to the Project received through participation in this RFP is confidential and may not be disclosed without the written authorization from KCDLCP, and in no event will a bidder discuss the Project with any member of the public or the media without the prior written approval of KCDLCP.

Reservation of Rights

KCDLCP reserves the right, in its sole and absolute discretion, to:

- (a) amend the scope of the Project, modify, cancel or suspend the competitive selection process described herein at any time for any reason;
- (b) accept or reject any proposal based on its established evaluation criteria;
- (c) waive a defect or irregularity in a proposal and accept that proposal;
- (d) not accept, to reject or to disqualify any or all proposals for any reason without any obligation, compensation or reimbursement to any bidder;
- (e) re-advertise for new proposals, call for tenders, or enter into negotiations for the Project, for portions of the Project, or for work of a similar nature with any person;
- (f) make any changes to the terms of the business opportunity described in this RFP;
- (g) negotiate any and all aspects of proposals; and



- (h) extend, from time to time, any date, time period or deadline provided in this RFP, upon written notice to all bidders.

Ownership of Proposal

All proposals submitted to KCDLP become the property of KCDLP and will be received and held in confidence by KCDLP. This RFP is the exclusive property of KCDLP. This RFP may not be copied, transmitted, or disclosed by any means without the joint written consent of all involved parties. By accepting a copy hereof, the recipient agrees to be bound by these conditions and to use these documents solely for responding to this RFP.

Limitation

Each bidder on its own behalf:

- (a) agrees not to bring any claim against KCDLP or any of its employees, advisors or representatives for damages in excess of an amount equivalent to the reasonable costs incurred by the bidder in preparing its proposal; and
- (b) waives any and all claims against KCDLP or any of its employees, advisors or representatives for loss of anticipated profits or loss of opportunity if no agreement is made between KCDLP and the bidder for any reason.

Contract Negotiations

At the completion of the selection process, KCDLP will enter negotiations with the selected bidder, and the following documents may be included as attachments to the final contract:

- (a) this RFP;
- (b) the bidder's proposal;
- (c) any modifications to the proposal; and
- (d) an implementation plan identifying the tasks to be completed with milestones, the assigned responsibilities, and the scheduled completion dates.



SCHEDULE A – SCOPE OF WORK

Introduction / Background

The Kluane Community Development Limited Partnership (KDCLP) was established in 2011 with the mandate to provide economic development services to support local economic development and business growth for the Kluane First Nation (KFN) and its citizens. The relationship between KFN and KDCLP is articulated through a Memorandum of Understanding (MOU) and an annual Service Contract and Funding Agreement. KDCLP has three corporate subsidiaries, including Burwash Landing Resort Ltd., Kluane Energy Corp., and 16650 Yukon Inc.

Since its creation, KDCLP has pioneered its own community economic development model that has resulted in significant community investments. KDCLP has been successful in developing industry partnerships, growing local economic activity, and offering training, employment, and contract opportunities that have benefitted KFN citizens and businesses. Over time KDCLP has developed valuable experience and capacity managing the implementation of community-driven projects and growing profitable business services.

This *Corporate Strategy 2018-2020: Creating Economic Resilience* is focused on putting in place proper systems and processes to strengthen ongoing collaboration with KFN Chief and Council and department staff, and creating more opportunities for community engagement, training, and participation in business growth opportunities. The strategic goals are focused on five key areas:

- A. **Corporate Governance** | Strengthen decision-making processes, bylaws, and policies to clarify duties and responsibilities and build community trust and confidence.
- B. **Community Projects** | Manage collaborative projects and leverage funding to build up community services, facilities, and infrastructure.
- C. **Business Growth** | Develop sustainable business opportunities that generate profit for further growth and reinvestment back into community projects.
- D. **Economic Benefits** | Promote entrepreneurship, training, employment and contracting opportunities to maximize economic benefits for KFN citizens and local companies.
- E. **Communication Practice** | Strengthen communication protocols and practices to improve community engagement and stakeholder relations.

The strategies build upon past successes and incorporate new ideas for improving KDCLP services and operations. KDCLP will continue to work in partnership to implement actions that align with KFN priorities and lead to sustainable economic opportunities and benefits for the people of Kluane First Nation.

Project overview & objective

Facilitator will schedule review current strategic plan, conduct internal & external analysis, review and revise KCVDLP Vision and Mission Statements and establish new Goals and Objectives for 2021 -2023 with KDCLP Board, KDCLP Manage & Staff.

Scope of Work



KLCDP is seeking the services of qualified Contractor to submit a proposal for the services to facilitate, review, conduct analysis and plan with the Board, Management, Staff, KFN Corporate Working Groups and Community for the following:

- Reviewing the 2018 – 20 KCDLP “Creating Economic Resilience” Strategic Plan
 - Where are we now?
- Participate in Corporate Level Economic Strategy Planning with KFN, Kluane Dana Holding, Kluane Trust, Kluane Dana Shaw & KCDLP;
 - Where will we play?
 - How we will win?
- Facilitate Internal Strengths, Weakness & External Opportunities or Threats, PESTLE and Porter’s Five Forces analysis.
 - Where are we now?
- Facilitate, review and potentially revise or develop KCDLP Vision & Mission Statement
 - How will we get there?
- Review & potentially revise existing principles
- Develop Goals & key strategic objectives
- Establish Key Performance Indicators
- Develop a implementation /actions plans

Deliverables

- Review of current strategic plan: How did we do? What was accomplished, did we meet our goals?
- Updated strategic plan, completed with:
 - analysis,
 - vision & mission statements,
 - guiding principles,
 - SMART goals and
 - objective and implementation/ actions plan
- Analysis
- Project Final Report

Key Documents

- KCDLP Creating Economic Resilience, 2018-2020 Strategic Plan
- Project Charter
- KCDLP Finance Policy
- KCDLP Bylaw 1
- KCDLP Partnership Agreement

Work Completion Deadline – Services must be completed by March 19th, 2021.



SCHEDULE B – TECHNICAL PROPOSAL

Project Management

◆ The bidder will provide at least the following information to KCDLP:

1. the description of the different phases of the Project;
2. the methodology and approach;
3. specific list of the deliverables by phase the bidder intends to provide along the Project; and
4. key performance indicators proposed for service delivery.

Bidder Details

Company Name	◆
Phone	
Email	
Company Address	◆
Corporate Access No. (YG)	
Business No. / GST No.	
Workers Compensation No.	
Insurance Details and Policy No.	
Bank Account Info.	Bank Account Holder Name: Bank Address: Institution: Transit: Account:



Holding Company or Parent Company <i>(if any)</i>	◆
Please provide details of ownership: private/public; ultimate parent; major shareholders. Any significant changes in ownership in the last two years?	◆
Account Representative	◆
Years in Business	◆
Certifications	◆
Please provide details of any quality process certifications	◆
Any other certifications, please specify	◆

Staff Details

Total number of employees	◆
Please provide a break-up of the number of employees by function, e.g.	◆
Administrative Staff	◆
Research & Development	◆
Implementation Staff	◆
Technical Support Staff	◆
Other	