

## **IMPORTANT NOTICE**

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Responsibility for using the RFP template and process remains with the user.***

**Request for Proposal**  
**Name of Organization**  
**Title of work project**

### **Introduction**

*Insert brief introduction here.*

### **Background**

*Insert background information here.*

### **Scope of Work**

**Work Elements** *(those elements listed below are examples only; element headings and their descriptions will differ depending on the project)*

- ✓ **Stakeholder Inputs:** *Input into the study from representatives of key stakeholders is required. The proposal must describe the consultant's approach to obtaining input from stakeholders, the scheduling of stakeholders input processes within the study timeline and explanation of how stakeholder input will be used to inform the study. Example stakeholders include but are not limited to the following:*
  - Board Members
  - Membership
  - Government Officials (Federal, Territorial & First Nations);
  - First Nations Representatives;
  - Renewable Resource Councils;
  - Other Provincial/Territorial Associations.

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- ✓ **Development of Strategic and Operation Plan:** In this phase, the study must determine the newly defined Association's strategic objectives and use this information to develop an operational plan. This must include but is not limited to the following:
  - Evaluation/Development of a Mission Statement;
  - Identify and assess the viability of new activities to ensure its long term sustainability (e.g., enhancing marketing of current services to members and general public, tourism oriented products, etc.)
  - Goals for re-organization and transition;
  - Five year goals;
  - Definition of the organizational structure and staffing levels (if applicable);
  - Use of existing facility (e.g., office space);
  - Guidelines to determine the effectiveness, efficiency and viability of operations;
  - Budget development for years 1 through 3;
  - Other relevant data necessary for successful operation;
  - Develop management goals;
  - Make recommendations for implementing the business plan.
  
- ✓ **Strategy for Transition:** *This element of the study must lay out a strategy for implementation of the Strategic and Operation Plan. This must include the following for successful implementation:*

Examples:

- Formal transition of Board Members into the organization;
- Operational procedures, including board policies and by-laws;
- Staff structure (if applicable);
- Financial procedures;
- Board and Membership goals;
- Structure and composition of the Board of Directors;
- Terms of office of the Board of Directors.

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**Work Deliverables** *(those deliverables listed below are examples only; deliverables will differ depending on the project)*

*Sample description: A detailed organizational business plan which describes approaches used, analysis performed and presents key findings and recommendations. The report must include an executive summary and should be accompanied by appropriate supporting tables and exhibits. An original and five copies of any documents produced (e.g., final report) and an electronic version must be provided. A note on who retains copyright for all materials should be listed here.*

**Project Timeline** *(those activities listed below are examples; activities will differ depending on the project)*

Proposals due	<i>Insert dates</i>
Proposals reviewed by Board	
Contract awarded and signed off	
Study begins	
Interim report to board, including an interim financial report	
Consultant final report, including detailed financial report which can be submitted to meet CDF guidelines for reporting.	
Consultant presentation to membership	

**Project Management** *(Sample provided below - Project Management directives will vary depending on the project)*

*Insert title of position of person who will manage this project. Additional board members of the Association will provide input into the study, and will review the consultants work as required (including the interim report requirement).*

**Proposal Content and Submission** *(Directives listed below are examples only; directives will differ depending on the project)*

Proposals must contain the information listed below:

- ✓ **Transmittal Letter** containing the signature of the individual who is authorized to bind the consultant to the terms of the proposal.

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- ✓ **Consultant Profile:**
  - The consultant(s) name, address, telephone numbers and e-mail address;
  - Résumés of individuals who will work on this project. Résumés must include information about the individual's background, qualifications and experience conducting similar studies. Résumés must detail expertise and experience in all the areas listed in the Scope of Work; and
  - A list of similar or related studies performed by the consultant.
- ✓ **Project Approach** describing how the consultant will conduct the study, highlighting approaches, techniques and/or methodologies to be used to address the items outlined in the Scope of Work section and the content of the final written report. The project approach must include a work plan outlining major tasks to be performed and a project timeline identifying major milestones and deliverables.
- ✓ **Travel Timeline** *should be included if travel is required. Costs should be clearly identified in the proposed budget.*
- ✓ **Cost Proposal** identifying each major task, the number of hours planned for each task, hourly rates/fees of individuals performing the work, costs associated with making presentations at up to two public meetings, and the estimated total maximum cost for the project. The cost proposal should also address the consultant(s) willingness to perform additional analytical work in the event additional project tasks are needed or should additional work be necessary after the project is completed, and the hourly rate(s) that would be charged for such work.  
**Value not to exceed \$ X amount.**
- ✓ **Three References** for similar studies conducted within the last five years by the personnel proposed for this project. References should identify the client organization, nature and date of the study, and the name, title, telephone number and e-mail address of the contact person for each reference.

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### **Project Submission**

Please submit an original and three copies of the proposal. Proposals will be accepted until *insert time, day, and complete date* to the address listed below. Proposals sent by mail which arrive after the deadline date **will not be accepted**. All proposals should be in **sealed envelopes** and will be opened after the deadline by the review committee.

NAME

**Re: NAME OF PROJECT**

ADDRESS

E-mail:

Phone:

Fax:

### **Selection Process**

The *insert name of the association* hiring committee will review all submitted proposals. The contract will be awarded based upon qualifications, content and quality of the response, proposed approach and work plan, the ability to provide services within the desired timeframe, and cost considerations. The lowest price will not necessarily be awarded the contract.

Proposals and materials produced by the consultant in the course and scope of this engagement shall become the property of the *Insert name of the Association*.

*Insert any other details related to the selection process.*

### **Conditions of this Request & Acceptance of Responses**

The *insert name of the Association* reserves the right to cancel or modify the selection process or reject any proposals that are deemed to be unresponsive. The *insert name of the Association* does not make any representation that an agreement will be awarded to any party making a submittal. The Association is not liable for any costs incurred by bidders related to the preparation of their proposal or in any other aspect of their consideration for this project. This RFP is not an agreement to purchase goods or services.

*Insert any other details related to the conditions of the request and acceptance of responses.*