



Request for Proposal

Education, Employment and Training Needs Assessment

RFP-2020-04 – Education, Employment and Training Needs Assessment

Issue date: June 30, 2020

Closing date and time: 2:00pm PST on July 16, 2020

Proposals received after the Closing Date may be rejected.

Proponents are requested to deliver and ensure proposals are received and time/date stamped.

Mail / Courier	Electronic (preferred)
Westbank First Nation 301-515 – Highway 97S, Kelowna BC, V1Z3J2 Attention: Purchasing (See instructions below)	Electronic copies of the RFP may be submitted to: Purchasing@WFN.ca The subject line must contain the following: Response to RFP-2020-04 – Education, Employment and Training Needs Assessment (See instructions below)
Fax Responses Will Not Be Accepted	

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Section 1 – Instruction to Proponents

This section defines the proposal preparation and submission procedures that are to be followed by all Proponents. Proponents are cautioned to carefully read and follow the procedures required by this proposal, as any deviation from these requirements may be cause for rejection. In this Request for Proposal (“RFP”), Westbank First Nation is referred to as “WFN”.

1. Request for Proposal Summary

WFN is requesting proposals from qualified and professional individuals or firms to conduct a methodical needs assessment on WFN’s future Education, Employment and Training needs. The selected proponent will have up to a maximum of 16 weeks to conduct and report the findings of the assessment.

This contract is a result of WFN’s approved grant (C20CBI134) for the Capacity Building Funding Agreement offered through the Province of British Columbia.

2. Proposal Closing and Submission Instructions

- A. The closing date for this Request for Proposal is July 16, 2020 at 2:00 PM PST, based upon WFN’s Time Clock (the “Closing Date”).
- B. Proposals received after the deadline may be rejected.
- C. WFN requests that proposals be delivered by the following method:
 - 1. Electronically

Proponents are requested to remit one (1) copy of their proposal electronically in Adobe or Microsoft format via e-mail to purchasing@wfn.ca and are to clearly identify the complete RFP number and name in the e-mail subject line of their the submission, provided that;

- i. If Proponent's response submission exceeds ten (10) MB of file size, the proposal must contact purchasing@wfn.ca to make alternative arrangements (EG.: flash drive, digital disc, Sharefile, FTP site, etc.)
 - ii. WFN will NOT accept responsibility for a failed or incomplete transmission of a proposal, etc.
 - iii. WFN will NOT accept alterable forms of electronic transmissions.
- D. Fax Proposals will **NOT** be accepted
- E. Hardcopies are acceptable, but electronic copies are preferred.
 - 1. Please ensure all hardcopies of proposals are delivered during normal operating hours: Weekdays 8:30 AM to 4:30 PM (but in any event, **before 2:00 PM on the Closing Date**), in an envelope identified with the name and address of the Proponent, addressed to Westbank First Nation, Attn: Purchasing; with the RFP number and Closing Date clearly identified on the outside of the package to the following address:

Westbank First Nation
101 - 515 Highway 97 South, Kelowna, BC
V1Z3J2
Attn: Purchasing

3. How to Submit your Proposal

Proponents are requested to complete and return all the following by proposal closing time:

- i. 'Schedule "A" – Pricing Schedule' as found in Section 3 of this RFP;
- ii. Deliverables, as described in Section 3 of this RFP;
- iii. References contained in Section 5 of this RFP;
- iv. Westbank First Nation Proposal Form contained in Section 6 of this RFP;
- v. Any appendices, if requested; and
- vi. Additional Information, requested, not required (Section 7).

Proponents are not required to return sections containing the general and specific terms and conditions of this RFP, as applicable.

4. Submission Conditions

- A. Proponents' must ensure receipt of a complete set of documents as listed by the page numbers. By submitting a proposal, the Proponent verifies its receipt of a complete set of proposal documents, including all addenda.
- B. Any additions or deletions made after 2:00 PM on the RFP Closing Date will not be accepted.
- C. Proponents must allow sufficient time for the delivery of proposals by the Closing Date and time, based upon WFN's time clock (Pacific Time). Proposals received after proposal closing time may be returned to the Proponent unopened.
- D. Proposals will be opened in a confidential manner after the proposal Closing Date.
- E. Except as provided in the Withdrawal of Proposals clause, proposals are irrevocable and will remain open for acceptance for a period of sixty (60) calendar days after the Closing Date.
- F. All references made to money in any proposal must be in Canadian funds.
- G. Proposals, rather than tenders, have been requested in order to afford Proponents a more flexible opportunity to employ their expertise and innovation, and thereby satisfy requirements in a more cost- effective manner. Proposals should be based on the instructions as outlined in this RFP.

5. Withdrawal of Proposals

The Proponent may withdraw its proposal at any time prior to the Closing Date and time by submitting a written withdrawal letter to WFN's Purchasing Manager, whereupon the proposal will be returned unopened.

6. Clarification

- A. Questions relating to the proposal must be directed to the contact whose name appears below (the "WFN Contact").

Proposal/Technical Inquiries:	Jonathon Mitchell, Purchasing Manager Westbank First Nation Phone: (250) 769-4999 purchasing@wfn.ca
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- B. The Proponent may submit (in writing and by email (purchasing@wfn.ca)) any questions regarding the specifications, discrepancies, omissions, or any apparent ambiguities to the attention of WFN not less than three (3) working days before the Closing Date.
- C. WFN will review the question(s) and, where the information sought is not already clearly indicated, WFN will issue an addendum to all Proponents which such addendum will form part of the contract documents.

- D. Addenda are the only means of verifying, clarifying, or changing any of the information contained in this RFP. No employee or agent of WFN, other than the Purchasing Manager or duly authorized delegate, is authorized to change the content of the Proponents' proposal and/or any addenda. Receipt of all addenda must be acknowledged in the space provided on the Proposal Form.
- E. WFN will not grant requests for individual meetings in person with Proponents to answer any question before the Closing Date or before contract award, unless otherwise indicated in this document.

7. Ineligibility of Proposals

It is essential that Proponent's proposals thoroughly address and complete each requirement identified in this RFP. Furthermore:

- A. Incomplete proposals may be declared "non-responsive";
- B. Proposals that are improperly signed, conditional, illegible, obscure, or contain material arithmetical errors, erasures, alterations, or irregularities of any kind may be considered invalid;
- C. Where there is a discrepancy, written amounts shall take precedence over figure amounts;

8. Proposal Signing

Proponents must, under the hand of a duly authorized signatory, execute the Proposal Form contained in Section 6. The Proponent's legal name and the capacity in which the authorized signatory acts must be confirmed in the proposal. Proposal forms that do not contain an authorized signature may be rejected.

9. Contract Documents

- A. Proponents must identify proposals with the designated proposal number as indicated.
- B. The following list of documents, and any other documents that may be incorporated by agreement of WFN and the Proponent shall comprise the contract documents, which include the following:
 - i. the General Terms and Conditions and Specific Terms and Conditions appearing as part of this document;
 - ii. the Specifications appearing as part of this document;
 - iii. the Proposal Form and RFP Response, as submitted by the Proponent;
 - iv. WFN's standard form of contract and/or purchase order; and
 - v. any addenda issued prior to the closing of this RFP
- C. WFN assumes the Proponents acceptance of the general and specific terms and conditions unless the response clearly indicates otherwise. WFN reserves the right to negotiate, accept or reject Proponents' changes to the general and the specific terms and conditions.
- D. Where the terms and conditions of WFN's standard form of contract conflict with those of any other contract document, the terms and conditions of WFN's standard form of contract will prevail.

10. Taxes

WFN is not subject to Provincial ("PST"), Carbon Tax or Goods and Services Tax ("GST"). Registration numbers are as follows:

GST# BN#105626220 RT0001
PST# 1014-8312

11. Proposal Costs

The Proponent is responsible for all costs incurred in the preparation and delivery of a proposal. For greater clarity, no costs whatsoever associated with the preparation and delivery of a proposal are chargeable to WFN.

12. Limitation of Damages

The Proponent, by submitting a proposal, agrees that it will not claim damages in excess of an amount equivalent to the reasonable costs incurred by the Proponent in preparing its proposal for matters relating to the agreement or in respect of the competitive process. Furthermore, the Proponent, by submitting a proposal, waives any claim for loss of profits if no agreement is made with the Proponent.

13. Liability for Errors

While WFN has made considerable efforts to ensure an accurate representation of information in this RFP, the information contained in this RFP is supplied solely as a guideline for Proponents and is not necessarily comprehensive or exhaustive. Nothing in this RFP is intended to relieve Proponents from forming their own opinions and conclusions in respect of the matters addressed in the RFP.

14. Compliance

Proponents agree to comply with all laws and regulations affecting this proposal document in any manner and agree to take further steps as may be necessary to effect such compliance. All laws and regulations required to be incorporated in contracts of this character are hereby incorporated by inference.

15. Entire Agreement

The Proponent may be required to sign an agreement WFN, as set out in the Contract Documents section of this document. That agreement, together with the documents referenced in the Contract Documents section of this RFP, shall be known as the Contract, and will constitute the entire agreement between the parties and supersede all prior verbal negotiations and representations.

16. Acceptance of Proposal

- A. WFN is not bound to award to any Proponent or to the lowest priced qualified Proponent. The awarding of the RFP (if made) will be made upon all the evaluation criteria disclosed in this RFP, and shall be in the sole discretion, based upon the best overall value to the contracting First Nation.
- B. All proposals are subject to Council approval and funding. Should all proposals received exceed the set budget or not receive Council approval, WFN reserves the right not to accept any proposals.
- C. WFN reserve the right to disqualify from the competitive process, without notice or consultation any Proponent that has failed to meet its contractual obligations to any prior contract, in WFN's sole opinion. This includes, but is not limited to, situations which the Proponent has committed:
 - i. A breach in a current or prior contract with WFN;
 - ii. Repeated critical or fundamental performance deficiencies without any remedial actions, despite formal notifications from WFN.

17. Right to Reject

- A. WFN, in its sole discretion, reserves the right, upon appropriate investigation and evaluation, to determine to reject any or all proposals received, or to accept any proposals it considers advantageous, based on, inter alia, the following considerations:
 - i. a request for proposals must be cancelled due to budgetary issues that adversely impact WFN's ability to carry on its operations;
 - ii. there is a change in economic circumstances which adversely impact the WFN's operations;

- iii. information becomes available to WFN after the Closing Date which significantly changes the original scope of a request for proposal; or
 - iv. fewer than three (3) proposal responses are received by WFN;
- B. The right is reserved, as the interests of WFN may require, it to reject any or all proposals or to waive any minor irregularity or non-compliant issues in proposal(s) received.

18. Negotiation Privilege

WFN will ensure they have the ability to arrive at a mutually agreeable final contract with a Proponent(s). Negotiations may be held with the first potential Proponent including, but not limited to, matters such as:

- A. Price adjustments;
- B. Minor changes to scope of work;
- C. Contract details;
- D. Contract payment details; and
- E. Service requirements.

It is not the intent of WFN to allow for new or significantly altered proposals.

If a written contract cannot be negotiated with the Proponent who receives the highest score in the evaluation of the proposals received, WFN reserves the right to terminate negotiations with that Proponent and negotiate a contract agreement with the next highest ranked Proponent, or choose to terminate the RFP process and not enter into a contract with any of the Proponents.

The Proponent acknowledges and agrees that WFN is never contractually (or in any other manner) obligated to any Proponent until a written contract has been duly executed.

19. WFN Member Employment

As outlined in the Westbank First Nation Purchasing Policy https://www.wfn.ca/docs/policy_2015-09_goods_services_and_asset_procurement.pdf, every RFP, Competitive Quotation, and Public Tender must contain and be evaluated using an Adjusted Price Calculation for businesses owned by or employing WFN members.

20. Award of Proposal

WFN will notify the successful Proponent and will issue a standard form of contract.

Section 2 – General Terms and Conditions

These Terms and Conditions will form part of any contract made with a successful Proponent pursuant to this RFP process.

1. Governing Law/Jurisdiction

This RFP shall be governed by and construed in accordance by the laws of Westbank First Nation, Canada and the Province of British Columbia, as applicable. The courts of British Columbia and Canada, as applicable, will have exclusive jurisdiction to determine all disputes and claims arising out of or in any way connected with this RFP.

2. Review

WFN will perform regular reviews of the relationship with their successful Proponent to ensure service is satisfactory. If any deficiencies in service or support are encountered, they have the option of terminating the contract at any time. The judgment as to those deficiencies is at the sole discretion of WFN.

3. Payment Terms

Payment terms are net thirty (30) days of receipt of an invoice.

WFN offers and encourages the use of electronic funds transfer (EFT) for those with whom it contracts ("Contractors"). Successful Contractors will be presented with an option to initiate an EFT request with their contract documents. Invoices shall match the proponents proposed schedule of events, milestones or phases of the project as defined in the Pricing Schedule (Section 3 of this document).

4. Independent Contractor

- A. A successful Proponent is in every case deemed to be an independent Contractor, and neither the successful Proponent, nor its directors, officers, employees, servants or agents are or can be held to be the directors, officers, employees, servants or agents of WFN.
- B. The successful Proponent shall not, in any manner whatsoever, commit WFN to the payment of any money to any third party.
- C. WFN may, from time to time, give such instructions as it considers necessary to the a successful Proponent in connection with the provision of the Services as outlined in Section 3 of this RFP (the "Services"). The successful Proponent shall comply with these instructions, but the successful Proponent will not be subject to the control of WFN with respect to the manner in which such instructions are carried out except in regard to generally applicable standards, policies and guidelines.

5. Records

- A. A Contractor shall maintain all records and books concerning the Services provided and fees invoiced by the Contractor under this contract made pursuant to this RFP.
- B. A Contractor shall maintain all records and books, together with all relevant documents and materials, for the duration of such contract, including any and all

renewals of this such contract, for seven (7) years (or such other statutorily-required duration) following the completion or termination of this contract.

- C. When requested by WFN, a Contractor shall make available all books and records, together with the supporting or underlying documents and materials, for inspection, audit, or reproduction by its employees and/or subcontractors or authorized representatives, during normal business hours at the Contractor's office or place of business. The Contractor shall not charge WFN any fee for the cost of reproduction of records required under this contract.
- D. WFN may, at any time during the term of such contract, audit all the Contractor's accounting records and books concerning Services provided under such contract, including any and all documents and other materials, in whatever form they may be kept, upon which the accounting records and invoices are based.
- E. Upon receipt of a request from WFN, a Contractor shall, within two (2) business days, give full access to the Contractor's complete file relevant to the contract arising from this RFP.

6. Advertising, Publication or Solicitation

- A. A successful Proponent shall not advertise its relationship with WFN, or use their name or any content of the contract arising from this RFP in any advertising, mailing list or publication, written or verbal, except with the written consent of the First Nation.
- B. Any use or reference by a successful Proponent to this RFP to promote, solicit, or disseminate information regarding the details of the contract arising from this RFP is prohibited except as allowed in this section.
- C. If WFN, in its sole discretion, determines that the use of the phrase noted in part A of this section is inappropriate, or may in any way cause harm to it or its reputation, they may, in writing direct a successful Proponent to cease using any reference in its advertising, or may terminate the contract arising from this RFP, or both.

7. Confidentiality and Freedom of Information

- A. A successful Proponent will treat as confidential, and except insofar as such publication, release or disclosure is necessary to enable the successful Proponent to fulfill its obligations under the contract arising from this RFP will not, without the prior written consent of WFN, publish, release or disclose or permit to be published, released or disclosed, any information supplied to, obtained by, or which comes to the knowledge of a successful Proponent as a result of the contract arising from this RFP except as required by law (the "Information"). In such instances, the successful Proponent shall advise the First Nation prior to disclosing the Information.
- B. Any Information or records retained by the successful Proponent should be securely stored and measures must be in place to restrict access to authorized personnel only. Measures should be taken to protect Information and records from fire, flood, natural disaster, criminal activity or unauthorized access to systems and data.
- C. The successful Proponent agrees to immediately notify WFN, both verbally and in writing in the event of any unauthorized disclosure of Information. This notice will include the names and claim numbers of the individuals who's Information has been

compromised, the date of the incident, and the specifics of the incident that occurred that compromised the security of the Information.

8. Treatment of Information

- A. All information contained in a Proposal submitted in response to this RFP will, in general, be available to the public in accordance with the applicable access to information legislation. The Proposal will become the property of WFN, and will not be returned to the Proponent(s).
- B. If the Proponent(s) believe any of the information requested in this RFP and provided by them is confidential in nature, the Proponent(s) will identify said information as such and provide a rationale as to why it should not be released under the applicable access to information legislation.
- C. The rationale for keeping information confidential under access to information legislation can include:
- D. Trade secrets of the Proponent;
- E. Financial, commercial, scientific or technical information, the disclosure of which could reasonably be expected to result in material financial loss or gain, or could reasonably be expected to prejudice the competitive position of the Proponent; or
- F. Information the disclosure of which could be reasonably expected to interfere with contractual or other negotiations of the Proponent.

9. Ownership

The copyright in any material created by the successful Proponent in the completion of their obligations under a contract arising from this RFP will belong exclusively to WFN and the successful Proponent shall execute any assignments of copyright required to give this provision effect.

10. Conflict of Interest

- A. The successful Proponent shall ensure that the Services provided are without any conflict of interest. Examples of conflict of interest include, but are not limited to:
 - i. personal relationship between any officer, director, employee, servant or agent of the successful Proponent and any other person which results in work or Services being awarded to the successful Proponent;
 - ii. Any officer, director, employee, servant or agent of the successful Proponent approaching personnel, other than as required for performance of the Services, to in any way promote the business of the successful Proponent or otherwise solicit requests for Services;
 - iii. The retention of employees and/or subcontractors to provide Services;
 - iv. Distribution of promotional material while performing the Services for WFN.
- B. Where the successful Proponent recognizes or perceives a conflict of interest, the successful Proponent shall provide written notice to WFN of the conflict.

11. Indemnity

The successful Proponent shall indemnify and save harmless WFN from and against all claims, demands, losses, damages, costs and expenses made against or incurred, suffered

or sustained by them at any time where the same are based upon or arises out of anything tortuously done or omitted to be done by the successful Proponent or any officer, director, employee, servant or agent of the Proponent.

12. Termination

A. Termination for Cause:

WFN reserves the right to cancel all or any part of this contract arising from this RFP if the successful Proponent fails to deliver the Services in accordance with the terms of this contract to the satisfaction of them. Such cancellation shall be in writing and may be without notice and shall not result in penalty or other charges to WFN.

B. Termination for Convenience:

In addition to the remedy provided in any other clause within any contract arising from this RFP, WFN may, at its option, terminate this said contract at any time during the term of that contract, and, if such option is exercised, then said contract will terminate fourteen (14) days after the date such written notice is received or deemed received, by the successful Proponent and they will be under no further obligation to the successful Proponent, except to pay to the successful Proponent such amount as the successful Proponent may be entitled to receive, pursuant to payment for the Services provided to the date of termination. Such termination will not result in any penalty to WFN unless otherwise agreed to and as specified in any contract arising from this RFP.

13. Reserve the Right

WFN reserves the following rights:

- A. right to contract any set portion of the submitted proposal;
- B. accept no proposal whatsoever;
- C. accept or reject any proposal whether complete or not;
- D. negotiate changes to the successful proposal;
- E. reject any proposal it considers not in its best interests;
- F. not be liable for misunderstandings by Proponents or errors in the RFP;
- G. no obligation to accept the lowest priced or any proposal;
- H. issue addenda to the RFP;
- I. contact references provided by the Proponents;
- J. retain independent persons or contractors for assistance in evaluating proposals;
- K. request points of clarification to assist the WFN in evaluating proposals;
- L. require changes in the scope of Services as deemed necessary by WFN;
- M. withdraw the Request for Proposal (RFP).

14. Standards of Conduct and Policy Compliance

The successful Proponent shall perform all Services in a professional manner satisfactory to WFN, in accordance with the industry codes and/or professional standards as applicable.

15. Force Majeure

Neither party will be liable for any failure or delay to perform that party's obligations resulting from any cause beyond that party's reasonable control, including but not limited to fires, explosions, floods, strikes, work stoppages or slowdowns or other industrial disputes, accidents, riots or civil disturbances, acts of civil or military authorities, inability to obtain any license or consent necessary in respect of use with any telecommunications facilities, or delays caused by carriers, suppliers or material shortages.

Section 3 – Project Specifications

1. Background

Westbank First Nation (WFN) is one of seven native communities that belong to the Okanagan Nation, located in the Okanagan Valley of south central British Columbia. WFN lands are comprised of five reserves totaling 2161 hectares (5,340 acres). Tsinstikeptum IR 9 and IR 10 are the main developed community reserves, bordering Okanagan Lake and adjacent to Kelowna and West Kelowna, and is one of the fastest growing cities in British Columbia. WFN has been self-governing since April 1, 2005 and is considered a leader in the area of First Nation governance. Self-government has created new opportunities for the members of WFN and has opened the door for unprecedented growth and development on WFN Lands.

There are approximately 855 Westbank First Nation Members, the majority of which reside on reserve. WFN employs over 200 staff throughout its nine main departments and seven facilities. WFN operates similar to a municipality or local government, providing a multitude of services to support the community.

WFN obtained funding from the Ministry of Advanced Education, Skills and Training to pursue the Needs Assessment project detailed within this document. The intent of the proposed project is to conduct a comprehensive education, employment and skills assessment on WFN membership citizens to identify gaps in education and training in an effort to determine priorities of education and training opportunities, and to compile WFN membership citizen's employment statistics.

In 2010, WFN published a comprehensive Community Economic Development Plan: Human Resource Analysis. Since then, there has been a substantial increase in population, land development, and economic growth. WFN intends to revisit and review the statistic of the membership citizens to envision the future and the current state. The results can also support program-funding applications by demonstrating the demand for new educational and training programs or services.

2. Scope of Work

The selected candidate will be responsible for conducting sources of methodological research, data and statistics to analyze and development a comprehensive report.

1. This study will focus on WFN membership citizens;
2. Analysis of secondary sources, such as demographic information, and primary research methodology for new qualitative and quantitative data;
3. Assessment of needs must focus on factors that will effectively analyze membership citizens skills, education & training, employment, unemployed, and under skilled;
4. Assessing economic development and jobs growth, and to identify gaps that will prioritize the most pressing education and training needs to labour market needs;

5. Issues and trends that have an impact on WFN membership citizens and employer needs for education and skills, such as moving towards, or the development of new industry that demonstrates skills shortage; and
6. One on one interview, group discussion and survey to gather qualitative data

3. Deliverables

This Section outlines proposal submission requirements. Proposals must include the information outlined in this section. To facilitate uniformity of presentation and ease of evaluation, Proposals shall be limited to 20 pages total (including schedules, resumes, brochures and fee portion). At a minimum, proposals shall contain the following:

- a. Letter of Introduction

One page, introducing the proponent and signed by the person(s) authorized to sign on behalf of and bind the proponent to statements made in response to this RFP.

- b. Executive Summary

A one page summary highlighting the key features of the proposal.

- c. Qualifications and Experience

Describe specific roles, responsibilities, and qualifications of the individuals that will be taking on the Needs Assessment project. Also, define relative experiences that qualify you and your organization to complete the Needs Assessment project.

- d. Needs Assessment Project Methodology

Describe your approach to completing the Needs Assessment Project detailed within this document. Define how you will engage Membership citizens, and your approach to WFN's diverse community. Describe how you will approach and successfully complete each item defined within the Scope of Work (Section 3 – 2) and any other services you deem necessary to effectively complete the Needs Assessment project.

- e. Timeline and Milestones

Please provide a detailed schedule of events defining specific requirements, milestones and deliverables associated to the Needs Assessment project.

- f. References

Provide examples of municipal, local Government or First Nation clients that you and your organization have completed similar Needs Assessment projects as defined within this RFP (Section 5 of this RFP).

- g. Fees, Rates, Charges, and Other Financial Considerations

Provide detailed costs associated to the project in its entirety. Please provide estimated Proposed costs will be inclusive of the tasks and responsibilities detailed in Section 3 – 2 Scope of Work, above.

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Pricing Schedule

Please provide pricing in the following format (or similar) for your proposed services. Please note the total budget for the Assessment project is \$40,0000 (based on the total approved Grant).

Any extra work or services must be clearly defined and will not be approved unless a WFN representative gives written consent.

Pricing Schedule	
Needs Assessment Project (All Inclusive)	
Completed Prior to December 01, 2020	\$
Breakdown of Needs Assessment (Segments/Milestones etc.)	
	\$
	\$
	\$
	\$
	\$
	\$

4. Schedule of Events

The table below describes the anticipated schedule of events that relate to this RFP in its entirety. Please note these dates are subject to change. The Purchasing Manager will contact participating proponents with any changes to the proposed schedule of events as detailed below.

RFP Schedule of Events		
Order	Event	Date
1	RFP Issued	June 30, 2020
2	Questions Deadline	July 14, 2020
3	Proposal Deadline	July 16, 2020
4	Proposal Assessment	July 21, 2020
5	Notice to Proponents Sent	July 22, 2020
6	Contract Issued	July 24, 2020
7	Project Completion	December 01, 2020

Section 4 – Evaluation Process and Criteria

The awarding of any contract arising from this RFP shall be based on the overall best value to WFN. Proposals will be assessed and scored, based on the criteria that will include but is not limited to the Evaluation Criteria described below.

Proposals not clearly demonstrating that they meet the following mandatory criteria will be excluded from further consideration during the evaluation process.

Process

WFN will establish a cross-functional evaluation team that will include members of the Finance and Education departments. The evaluation team will review and evaluate each submitted proposal and evaluate the presentations from the shortlisted proponents.

During the evaluation, each proposal will be individually graded through the Evaluation Criteria by each member of the evaluation team.

Proponents may be contacted to verify information included in their proposal or for an interview process.

Evaluation Criteria

The table below outlines the Evaluation Criteria that will be used to evaluate each of the submitted proposals.

Evaluation Criteria	Weight
Qualification and Experience	25%
Methodology/Approach to Assessment	25%
Deliverables	20%
Costs/Fees	10%
References	10%
Value Add/ Additional Information	10%
Total	100%

Section 5 – References

Provide a minimum of three (3) organizations you or your organization has provided Assessment services to that are similar in scope as detailed within this RFP. Your references should reside within British Columbia, and have been completed within the last five years. WFN reserves the right to contact the references to confirm the nature of the work provided by a respondent, and to obtain additional information regarding the proponent’s performance. WFN will not enter into a contract with any proponent whose references in their sole opinion, is found to be unsatisfactory.

Reference 1	
Company Name:	
Contact Name and Title:	
Phone Number:	
Email Address:	
Service Details:	

Reference 2	
Company Name:	
Contact Name and Title:	
Phone Number:	
Email Address:	
Service Details:	

Reference 3	
Company Name:	
Contact Name and Title:	
Phone Number:	
Email Address:	
Service Details:	

Section 6 – Proposal Form

Company Name:

I/We hereby offer to provide the services outlined herein and to enter into a contract at the stated prices and fulfill the other requirements of the contract documents. Prices stated are in Canadian funds. No person, firm, or corporation other than undersigned has any interest in this proposal or in the proposed contract for which this proposal is made.

Addenda

Where information is sought and is not already clearly indicated in the RFP document, WFN may issue an Addendum. It is requested that receipt of any addenda be acknowledged as follows:

I/We acknowledge receipt of the following applicable Addenda to the Request for Proposal:

Addendum:	Date of Addendum	From Pages	To Pages
Addendum No. 1			
Addendum No. 2			
Addendum No. 3			

Authorized Signing Officer			
Legal Business Name:			
Other names your company operates under:			
Address:			
City:	Province:		
Telephone:	Email:		
Signature:			
Title:	Date:		

It is requested that this Proposal Form be executed by a principal duly authorized to bind contracts on behalf of the company. It is requested that the Proponent’s legal name and the capacity in which the signing officer acts be against the signature. Proposal forms that do not contain an authorized signature may be rejected.

Section 7 – Additional Information

Please provide any additional information you feel may be relevant to your proposal submission or that you feel gives a competitive advantage. Items may include service superiority, extra services, community support, community involvement, sustainability movements, in-kind donations etc.