



Request for Proposals (RFP)

Five-Year Strategic Plan Development

1. Summary

Wasauksing First Nation (WFN) is seeking proposals from qualified strategic planning consultants to facilitate engagement sessions and develop a comprehensive five-year strategic plan for the period 2018-2023. The successful consultant must have strategic planning experience and have a strong understanding of First Nations. The consultant must be able to facilitate the planning process, actively engage community members, staff and leadership to help create a realistic and achievable strategic plan that is suitable to be shared with the public.

2. Background

WFN is located on the eastern shore of Georgian Bay in Lake Huron, approximately 5 km off highway 69 and 3 kilometres southwest of Parry Sound on Parry Island which is the second largest island on Lake Huron with a land base of 7,874 hectares (19,457 acres). The Anishinabe/Potawatomi community has approximately 1,200 community members with approximately 400 members living on-reserve.

WFN is perfectly situated with respect to natural beauty and economic development potential. Our organization has a staff of approximately 90 and we provide programs and services in a broad range of areas including, health, economic development, social, public works, lands, membership/citizenship and education. With the guidance of the WFN Strategic Plan 2012-2017, WFN has been able to ratify its own Land Code, Constitution and will also become a part of the developing Anishinabek Education System. The First Nation also has an approved Consultation and Accommodation Protocol and is continuing its journey to have their financial system certified by the First Nation Financial Management Board.

The strategic plan will set the broad direction for the organization going forward over the next five years. The plan is not intended to be a detailed analysis of programs and/or operational plans but a plan to help WFN build upon a solid foundation to best position itself to achieve the community vision. WFN intends to use the plan to help guide strategic thinking on a broad range of issues/activities and to help the organization focus its resources.

3. Vision

WFN strives to provide equal opportunities for all members of the community to develop enhance and succeed in economic growth while promoting the continued social, traditional and spiritual development of its First Nation. The WFN guiding principles are the Seven Grandfather teachings and are further outlined in the WFN Constitution.

4. Scope of Work

The selected consultant will work with WFN to facilitate community engagement sessions and create a strategic plan that builds upon the current WFN vision and guiding principles and develops medium-term objectives/priorities and also short-term strategies/action plans with realistic timelines.

Performance measures, indicators or deliverables should also be included wherever possible to ensure that progress can be reviewed, monitored and reported back to the community and leadership

The consultant will be required to facilitate a series of inclusive and interactive group engagement meetings that gather input in a prioritized manner with:

- ✓ Chief and Council;
- ✓ Managers and Staff;
- ✓ Elders;
- ✓ Male/Female-based focus groups;
- ✓ Off-reserve community members/citizens;
- ✓ Youth.

Other potential forms of data collection or engagement might include the use of surveys or other similar tools. Consultants are encouraged to put forth the most effective and efficient method of engaging the community in their proposal.

It is also expected that the consultant will include some aspect of culture and tradition into the plan document. Traditional components that might be built into the plan include using the Medicine Wheel or other teaching models.

4. Deliverables and Outcome

This project will be a collaborative process between the consultant and WFN. The primary contact will be Craig Brown, Chief Executive Director.

The main deliverable is a five-year strategic plan that has been developed through extensive consultation with the community. The plan must highlight objectives and strategies grouped into areas, with action plans and timelines, potential challenges/issues, funding and/or resources required and performance measures/indicators where possible.

Other deliverables that must be included during the process or as a part of the strategic plan project proposal include requirements to:

- ✓ provide concise roll-up summaries for each community engagement session (date, number of people engaged, process used, prioritized input);
- ✓ provide a final engagement feedback summary after all sessions have been completed (final roll-up summary);
- ✓ provide regular updates on project progress and next steps;
- ✓ develop several concise leave behind summary documents (for example, charts, tables or other short descriptive pieces) that WFN can use to communicate the plan throughout the organization and community.

All documentation should be delivered in MS Office format (.docx, .xlsx, pptx, publisher) and .pdf format. The leave behind communication pieces must be branded as WFN documents (with logo). The strategic plan drafts and final document may include the phrase, "Prepared by 'Your Company'."

The strategic plan should be accompanied by all supporting material in such a manner that WFN can take ownership of the plan and carry on with its development as time progresses and circumstances

change.

5. Insurance

The consultant is responsible for deciding if insurance coverage is necessary to fulfil its obligations as part of the project and to ensure compliance with applicable law. Any insurance acquired or maintained by the consultant is at its own expense and for its own benefit and protection. It does not release the consultant from or reduce liability under the project.

6. Application and Selection Process

The RFP competition will close at 16:30 EDT on Thursday September 7, 2017. All proposals must be submitted electronically and all proposal submissions will be acknowledged. Late proposals will not be accepted.

During the consideration phase, the selection committee may contact consultants to gain further understanding of their proposal contents. Inability to respond in a timely manner may impact the overall decision of the committee.

Questions should be forwarded by email to ced@wasauksing.ca by Monday August 21, 2017 at 16:30 EDT. Responses will be provided by Wednesday August 23, 2017 at 16:30 EDT to all parties known to be submitting proposals.

Once a successful consultant has been selected, work on the project should begin as soon as possible.

7. Project Execution and Pricing

The timeline for delivery of a final report and any supporting documentation will be 12 weeks from the commencement of the project (estimated start date is late September 2017). The price quoted as part of the proposal should include all anticipated costs including travel and accommodation. However, travel and accommodation should be listed separately and will only be refunded should the travel be carried out.

Our expected total project budget has an upset limit of \$50,000, including disbursements.

8. Contractual Terms and Conditions

WFN has a standard service contract format that we use for all contracts; however, we are also happy to consider contract formats supplied by individual contractors.

All final documents/reports/summaries/plans and attachments shall become the property of WFN with no restrictions on its use.

Please note that WFN reserves the right not to proceed with this project.

9. Requirements for Proposal Preparation

All proposals should be prepared in MS Word (.docx) or .pdf. The proposal will be viewed with an eye for how well the proponent can get the relevant and important information across succinctly and accurately. At minimum, the proposal should include the following:

- ✓ a cover page with a signature from a signing authority of the consulting firm;
- ✓ description of the proponents firm or company, including ownership;
- ✓ overview of the project team (including any proposed subcontractors), its expertise and experience (please note experience with comparable projects and First Nation related experience). Please also attach resumes or staff profiles that contain comparable information;
- ✓ description of the project approach, methodology, cost and quality control;
- ✓ description of how culture and tradition will be included in the plan;
- ✓ budget and timelines with milestones and per diems for each project team member;
- ✓ at least two references. One reference must be for a past strategic plan for a First Nation organization and one may be for a comparable project (with permission to contact for both).

In order to provide proponents with maximum flexibility, this RFP identifies minimum requirements only. Proponents may propose enhancements to any aspect of this RFP as they see fit. In doing so, however, proponents must clearly identify the reason for recommending each particular enhancement and the cost and time implications of each.

10. Proposal Evaluation

The assessment and selection will be both objective and subjective. Objectively, we will be looking to see that the proposal has addressed all of our points and requirements. Subjectively, we will be looking to see that it demonstrates an understanding of our issues and objectives from an organizational, community, geographical and cultural perspective and that the consultant has the experience, capacity and ability to meet or exceed our requirements.

While price will be an important consideration, we will be looking for overall value and so the lowest bid will not necessarily be the successful proposal.

11. Proposal Communication

All communication regarding this RFP and the subsequent submission of your proposal should be directed to:

Craig Brown
Chief Executive Director
ced@wasauksing.ca (e-mail is the preferred means of communication)
(705)746-2531 Ext 2235

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