



REQUEST FOR PROPOSAL (RFP)

POLICY RESEARCH AND WRITING SERVICES

CURVE LAKE FIRST NATION
22 WINOOKEEDAA ROAD
CURVE LAKE, ONTARIO K0L 1R0

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1. SUMMARY AND BACKGROUND

Curve Lake First Nation is currently accepting proposals to contract an individual or a firm to provide comprehensive policy research and writing services to the First Nation for the term of one year. To date, policy work has been performed by a permanent, full-time, internal position that answered directly to the Chief Operating Officer. At this time, the position is vacant, and we are looking to outsource the work to complete policies that have been started and need to be completed, over the next year. The priority for the successful candidate will be updating our Conflict of Interest Policy and completing our Land Use Plan, which is currently in draft format. Community consultation will be required to complete the Land Use Policy and other policies that need to be completed.

The purpose of this Request for Proposal (RFP) is to solicit proposals from various individuals and/or organizations, conduct a fair and extensive evaluation based on criteria listed herein, and select the candidate who best represents the knowledge and experience needed to complete the tasks.

Curve Lake First Nation is located on a peninsula situated between Buckhorn Lake, Harrington Narrows and Chemong Lake. It is affiliated with the Union of Ontario Indians and is one of seven Williams Treaty First Nations.

The total registered population of Curve Lake First Nation is 2357. There are 791 members who live on reserve while 1566 live off the reserve.

The Council is comprised of one (1) Chief and eight (8) Councilors.

Curve Lake First Nation employs approximately 95 full time employees and 25 short term contracts and sub-staff.

2. PROPOSAL GUIDELINES

This Request for Proposal represents the requirements for an open and competitive process.

If the individual or organization submitting a proposal must outsource or contract any work to meet the requirements contained herein, this must be clearly stated in the proposal. Additionally, all costs included in proposals must be all-inclusive to include any outsourced or contracted work. Any proposals which call for outsourcing or contracting work must include a name and description of the organizations being contracted.

All costs must be itemized to include an explanation of all fees and costs.

Contract terms and conditions will be negotiated upon selection of the winning bidder for this RFP. All contractual terms and conditions may be subject to review by Curve Lake First Nation legal and will include scope, budget, schedule, and other necessary items pertaining to the project.

Proposal Inquiries

All questions, requests for information, instructions or clarifications regarding any part of this proposal document must be set out in writing and directed to:

Katie Young-Haddlesey, Chief Operating Officer
22 Winookeedaa Street
Curve Lake First Nation, ON, K0L 1R0
705-657-8045
KatieYH@curvelake.ca

All questions related to this Request for Proposal (RFP) or any clarification with respect to this RFP must be made no later than 3 Business Days prior to the closing date of this RFP in order that staff may have sufficient time to respond. Curve Lake reserves the right to extend the deadline for questions, if required, regarding this RFP.

Written answers or clarifications to issues of substance shall be shared with all Proponents and shall be issued as part of the RFP in the form of an Addendum. This proposal document and all addendum(s), if any, shall also be posted on the First Nation's website.

Proposal Submissions and Closing Date

The closing date for proposals is set for April 1, 2022, at noon EST. Only proposals that are mailed or emailed will be accepted. If packages are mailed, please send 3 copies of the proposal. Packages should be clearly marked **Proposal for Policy Research and Writing Services**.

Proposals should be submitted to the attention of:

Katie Young-Haddlesey, Chief Operating Officer
22 Winookeedaa Street
Curve Lake First Nation, ON, K0L 1R0
705-657-8045
KatieYH@curvelake.ca

3. PROJECT PURPOSE AND DESCRIPTION

The purpose of this project is as follows:

CLFN requires the services of an experienced Policy Research and Writing consultant or team, preferably with experience working with First Nations, to work with our senior management team, Chief and Council and Committees to ensure compliance and best

practices are followed. Engagement with all community, Chief and Council, and staff may be required from time to time.

Project Description:

CLFN requires the services of an experienced policy research and development team or individual to work with us over the next year to update and prepare new policies:

- Review of all policies to ensure that wording, formatting and terms are updated and consistent
- Review of all policies to ensure compliance with current legislation, laws and best practices
- Provide a flow chart or other method to indicated how policies interact with each other
- Priority to be given to updating the Conflict of Interest Policy and completing the Land Use Plan (currently in draft format)
- Undertake community engagement sessions as needed
- Research for the process of the development of new policy or updating existing policy
- Policy writing for new policies and updating existing policies

4. PROJECT SCOPE

CLFN is looking to contract the successful proponent for a one-year term to initiate the process of implementing the services listed above. If the working relationship is successful, there may be opportunity to continue the working relationship. Respect for, and prior experience, working with First Nation or in First Nation’s environments will be considered an asset.

5. REQUEST FOR PROPOSAL AND PROJECT TIMELINE

Request for Proposal Proposed Timeline:

All proposals in response to this RFP are due no later than **12:00 pm (noon) EST April 1st, 2022**

Evaluation of proposals will be conducted by April 8th, 2022. If additional information or discussions are needed with any bidders during this window, the bidder(s) will be notified.

The selection decision for the winning bidder will be made no later than April 15th, 2022
Contract negotiations will be completed by April 22nd,2022.

Notifications to bidders who were not selected will be completed by April 22nd, 2022.

Project Timeline:

Initial work to start May 1st, 2022.

6. BUDGET

All proposals must include proposed costs to complete the tasks described in the project description. These costs shall be itemized to included costs associated with travel, accommodations, workshops, production of policies as well as the overarching cost for conducting the work itemized above. Please divide into annual fee schedule and pricing for one-time costs. Please list all resources and an hourly rate for each person that will be involved in the policy updating and development.

7. BIDDER QUALIFICATIONS

Bidders must provide the following items as part of their proposal for consideration:

- Letter of introduction
- Description of experience in policy research and writing
- List of how many full time, part time, and contractor staff in your organization
- Two testimonials from past clients that are First Nations
- Anticipated resources you will assign to this project (total number, role, title, experience)
- Project management methodology
- Please reference evaluation form to ensure all mandatory requirements are included

8. PROPOSAL EVALUATION CRITERIA

Curve Lake First Nation will evaluate all proposals based on the following criteria. To ensure consideration for this Request for Proposal, your proposal should be complete and include all of the following criteria:

- **Organizational Experience:** Bidders will be evaluated on their experience working with First Nations communities or in First Nation environments within the past seven years. Bidders must provide the name of the First Nation, the year the work was completed, and the population of the First Nation.
- **Value and cost:** Bidders will be evaluated based on the work to be performed in accordance with the scope of this project. The lowest budget will receive maximum points and all others will receive a percentage of those points.
- **Local Content:** Points will be awarded for the number of employees/contractors that are members of Curve Lake First Nation, or children of members of Curve Lake First Nation.
- **First Nations Content:** Points will be awarded for the number of employees/contractors that are status First Nations.

9. PREPARATION OF SOLICITATION

If a proposing company, individual, or subcontractor was involved in the preparation of the RFP solicitation that proposal is disqualified.

10. PRIVILEGE CLAUSES

Curve Lake First Nation reserves its right:

1. Not to award the contract;
2. Not to award the contract necessarily to the lowest priced bidder, but rather to the best “value”;
3. To conduct negotiations with one or more bidders in the event the negotiations with the first bidder are unsuccessful;
4. To conduct a survey of potential bidders to obtain clarification of their proposals as part of the evaluation process;
5. To cancel and reissue the RFP; and
6. To extend any deadlines and amend the proposal process.

11. EXCLUSIONARY CLAUSES

The proposal writer shall be liable for all costs associated with preparation and submission of the proposal up to the final award of the contract.

Curve Lake First Nation shall not be liable for any costs, expenses, loss or damage incurred, sustained or suffered by any bidder prior, or subsequent to, or by reason of the acceptance or the non-acceptance by CLFN of any proposal, or by reason of any delay in acceptance of a proposal, except as provided in the tender documents.

Project Name: Policy research and Writing Services	Date RFP's Evaluated:
Proponents Name:	
	Proponent A
	Proponent B
	Proponent C
	Proponent D
	Proponent E
Department:	
Evaluation team name and signatures:	
<p>All members of the evaluation team are responsible for the integrity of the process, however it is the Chair's responsibility to ensure all processes are followed.</p> <p>Evaluation team</p> <p>Conflict of Interest All persons participating in the RFP evaluation process must ensure they are strictly compliant with the conflict of interest policy. All persons participating must sign the conflict of interest policy before participating. All persons participating in the RFP evaluation process must disclose any interests they or immediate family members (parent, parent in-law, spouse, common law partner, sibling, sibling in law, child) have in any sole proprietorship, corporation, or partnership that has submitted a bid. That includes if any of the above persons are the lead, an employee, a subcontractor or any other pecuniary interest. If there is a real, or perceived conflict of interest this will be disclosed to the relevant department manager in writing.</p> <p>All suppliers must disclose real or perceived conflicts of interest. All suppliers must resolve any conflicts of interest at the direction of CLFN.</p> <p>Contractual Obligations The following requirements will be included in any contract between the successful proponent and CLFN: Schedule Cos</p>	

Mandatory Requirements					Yes	No
	Prop. A	Prop. B	Prop. C	Prop. D	Prop. E	
	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	
Proposal submitted by due date: DD/MM/YYYY						
Letter of Introduction						
Description of experience in policy research and writing						
List of how many full time, part time, and contractor staff in your organization						
Two testimonials from past clients that are First Nations						
Anticipated resources you will assign to this project (total number, role, title, experience)						
Project management methodology						
Yes to all mandatory criteria? If yes, proceed to disqualifying criteria. If no, the bid CANNOT be further evaluated.						
Disqualifying criteria						
History of non-performing contracts within past five years from date of proposal submission deadline						
History of vexatious or frivolous litigation within past five years from						

date of proposal submission deadline					
Pending vexatious or frivolous litigation					
No to all disqualifying criteria? If no, proceed to weighted criteria.					
Weighted Criteria					
Experience Work with 2+ First Nations over the past seven years = 100 points Work with 4+ First Nations over the past seven years = 200 points Work with 6+ First Nations over the past seven years = 300 points					300 points
	Prop. A	Prop. B	Prop. C	Prop. D	Prop. E.
Budget Lowest cost receives maximum points and all other bids are evaluated according to the formula below. $\frac{\text{Lowest cost}}{\text{Cost being evaluated}} \times 300 \text{ points} = \text{awarded points}$					300 points
	Prop. A	Prop. B	Prop. C	Prop. D.	Prop. E
CLFN members and children of members employed and/or subcontracted by proponent Proposal with highest percentage of workforce as CLFN members and children of members receives 25 points $(\% \text{ being Evaluated} / \text{Highest } \%) \times 25 = \text{awarded points}$					

	Prop. A	Prop. B	Prop. C	Prop. D	Prop E.
Status First Nation individuals employed and/or subcontracted by proponent Proposal with highest percentage of workforce who are First Nation receives 25 points (% being Evaluated/Highest %) X 25= awarded points					
	Prop. A	Prop. B	Prop. C	Prop. D	Prop. E
Points Total out of total 1150. Highest points total is the successful proposal.					
	650	650	650	650	650