

REQUEST FOR PROPOSALS

Columbia Wetlands Stewardship Partners: Strategic Review



Issued: October 30, 2025

Closing Location:
Brisco, British Columbia

Closing Date and Time:
November 17, 2025, at 11:00 PM MST

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TABLE OF CONTENTS

1	PART 1 – Executive Summary	3
1.1	Background: Columbia Wetlands Stewardship Partnership	3
2	PART 2 – SPECIFICATIONS	3
2.1	Introduction	3
2.2	Scope of Work	3
2.2.1	Key Resources	3
2.2.3	Deliverables	4
2.3	Schedule	4
2.4	Cost	4
3	PART 3 – PROPOSAL SUBMISSION	5
3.1	Proposal Format	5
3.2	Proposal Content	5
3.3	Request for Proposal Terminology	5
3.4	Inquiries and Clarifications	6
3.5	Proposal Closing Date, Time and Location	6
3.6	Proposal Submissions	6
3.7	Ownership of Proposals and Freedom of Information	6
3.8	CWSP Right to Accept or Reject Proposal	6
3.9	No Claim for Compensation	7
3.10	Conflict of Interest	7
3.11	Anti-Collusion, Fraud & Corruption	7
3.12	Confidentiality	7
3.13	Irrevocability and Acceptance of Proposal	7
3.14	Irregularities and Informalities	8
3.15	Discrepancies or Omissions	8
3.16	Modification of Terms/Addenda	8
3.17	Liability for Errors	8
3.18	Basis of Contract Award	8
3.18.1	General	8
3.18.2	Project Specific	9
3.19	Definition of Contract	10
3.20	Form of Contract	10
4	APPENDIX A - Consulting Services Agreement	11

TABLES

Table 1.5	Table 2.	9	Error! Bookmark not defined.
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1 PART 1 – Executive Summary

1.1 Background: Columbia Wetlands Stewardship Partnership

The Columbia Wetlands Stewardship Partnership (CWSP) was formed in 2006. It is made up of over 31 groups, communities and agencies concerned with the health of the Columbia Wetlands. CWSP is a registered Charity under Canadian Law and a registered Society under the British Columbia Society Act.

The Columbia Wetlands is a very large wetland and river system located on the Upper Columbia River, in the East Kootenay portion of BC. Several major communities are located along the edge of the river and wetlands. They are recognized as a wetland of international importance by the United Nations under the RAMSAR Treaty. The system stretches 150 km from Canal Flats and Invermere in the south, to Golden in the north. The system is a complex mix of federal, provincial, municipal and private lands, covering 26,000 ha in total. Provincial lands in the wetlands are managed as the Columbia Wetlands Wildlife Management Area. Federal portions are managed as three National Wildlife Areas. There are also significant areas of private lands in the system.

The wetlands are very important to the people that live in the communities adjacent to the wetlands. Over the last several years, a major interest on the part of local NGOs, industry sectors and these communities have developed around assisting federal and provincial agencies in the stewardship and management of this very special wetland and river system.

1.2 The Project

The CWSP board is pursuing a project with a goal of updating the organization's strategic direction.

2 PART 2 – SPECIFICATIONS

2.1 Introduction

CWSP is looking to the future of the organization through the development of a renewed strategic direction with a timeframe of five-ten years. The development of a strategic direction document is envisioned to occur in two phases. **This RFP is for Phase 1 only.**

The goal of Phase 1 is to work with the CWSP board in the development of updated mission and vision statements and to develop a plan for updating the current strategy.

Phase 2 of this project will deliver (write a renewed plan and work with the Partners for approval) on the plan to update the strategy.

CWSP invites proposals from qualified consulting firms to complete Phase 1 of the Project.

2.2 Scope of Work

2.2.1 Key Resources

Proponents shall review, understand, and incorporate **The Columbia Wetlands Conservation Action Framework for 2020-2025** and other relevant reports and goals of CWSP, its Partners, and the Kootenay

Connect program of KCP. **The Columbia Wetlands Conservation Action Framework for 2020-2025** can be found here:

<https://drive.google.com/drive/folders/16M1lLwEUIAvvUZkkLNSGHSMWx7MdGGzX?usp=sharing>

2.2.2 Phase 1 Objectives

1. Complete a workshop with the board to review and update as required:
 - a. Mission statement
 - b. Vision statement.
 - c. Goals and outcomes.
2. Based on workshop results develop draft updates and a plan for moving forward with updating the strategic direction document which may include but not be limited to:
 - a. Review and confirm requirements under CWSP charitable organization status.
 - b. Review and confirm RAMSAR requirements and CWWMA/NWA management plans
 - c. Define roles and responsibilities for key members of the CWSP executive and partners.
 - d. Define direction for engagement and involvement of partner organizations
 - e. Governance and operational structures
 - f. Collaboratively develop a strategic direction for CWSPs focus on projects and partnerships.
 - g. Develop a model for funding CWSP operations

2.2.3 Deliverables

The deliverables will be a report documenting outcomes of the workshop and the draft mission and vision statements as well as a draft plan for moving forward with updating the strategic direction document.

2.3 Schedule

The Project schedule is provided in Table 1.

Table 1. Project Schedule

Name	Deadline	Description
Request for Proposal Opens	Oct 30, 2025	Submissions accepted for this Request for Proposal.
Request for Proposal Closes	Nov 17, 2025	Submissions received after this date will not qualify for review.
Contract Awarded	Nov 24, 2025	Selected proponents will be notified via email.
Contract Executed	Dec 8, 2025	Contracts to be signed by CWSP and selected proponent.
Deliverables Submitted	Feb 2, 2026	All final deliverables submitted to CWSP.

2.4 Cost

The applicant should clearly present all anticipated costs to complete the scope of work. Costs should be sufficiently explained so that the proposal review committee can assess the amount of time, effort, and

cost associated. This information may assist the review committee with scoring proposals. Additional proposal scoring details are provided in Table 2.

3 PART 3 – PROPOSAL SUBMISSION

3.1 Proposal Format

The Proposal should convey the Proponent’s intent clearly and concisely.

3.2 Proposal Content

3.2.1 The Firm

- a. Firm Experience/Past Performance - Firm’s past project experience with similar projects).
- b. Project Team - The qualifications and experience of the personnel the Proponent intends to use for the Work. This must include any subcontractors proposed to be used in the Work.

3.2.2 The Proposal

- a. Methodology/Approach - The Proponent’s approach to the services required as set out in Part 2 Specifications. Proponents may suggest alternative approaches or propose modifications that they deem improvements over the existing methodology.
- b. Scheduling/Work Plan - The completeness of the task items and rationale of the work plan which shows a clear indication of the anticipated work schedule. CWSP requests that proponents agree to meet or better the Project Schedule (Table 1) for submitting deliverables. However, if there are concerns about timing, please discuss them with the CWSP.
- c. Detailed Cost Breakdown – the Proponent should provide a detailed cost breakdown of all work tasks The proposal should also include details of the Proponent’s preferred arrangements for mileage, per diem and other disbursements.

3.3 Request for Proposal Terminology

The following terms will apply to this Request for Proposal and to any subsequent Contract. Submission of a proposal in response to this Request for Proposal indicates acceptance of all the following terms.

Throughout this Request for Proposal, terminology is used as follows:

- a) **“Contract”** means the written agreement resulting from this Request for Proposal executed by CWSP and the Consultant;
- b) **“Consultant”** means the successful Proponent to this Request for Proposal who enters into a written Contract with CWSP;

- c) **“Must”** or “mandatory” means a requirement that must be met for a proposal to receive consideration;
- d) **“Proponent”** means an individual or a company that submits, or intends to submit, a proposal in response to this Request for Proposal;
- e) **“Should”** or “desirable” means a requirement having a significant degree of importance to the objectives of the Request for Proposal;

3.4 Inquiries and Clarifications

Requests for clarifications or additional information related to this Request for Proposal should be directed, **in writing**, to the following persons:

Dr. Suzanne Bayley (sbayley@ualberta.ca), Catriona Leven (catrionasleven@gmail.com), and assistant.cwsp@outlook.com.

Enquiries and responses will be recorded and may be distributed to all Proponents at CWSP option.

3.5 Proposal Closing Date, Time and Location

Proposals must be submitted by the Closing Date and Time to the Closing Location identified on the cover page of this Request for Proposal.

3.6 Proposal Submissions

A digital PDF format of the Proposal submission should be sent by e-mail to: catrionasleven@gmail.com, sbayley@ualberta.ca, and assistant.cwsp@outlook.com, **with the email subject line “Proposal –CWSP Strategic Review 2025”**

3.7 Ownership of Proposals and Freedom of Information

All responses to this Request for Proposal will become the property of CWSP. By submitting a Proposal, the Proponent agrees CWSP has the right to copy the Proposal Documents. Proposals will be held in confidence by CWSP, subject to the provisions of the *Freedom of Information and Protection of Privacy Act* and any requirement for disclosure of all or a part of a Proposal under that Act. The requirement for confidentiality shall not apply to any Proposal that is incorporated into a Contract for the Work. Further, CWSP may disclose all or part of any Proposal to the proposal review committee, at a public meeting of the Board, or when making a recommendation for the award of the Contract.

3.8 CWSP Right to Accept or Reject Proposal

The lowest cost or any Proposal will not necessarily be accepted. CWSP reserves the right in its absolute discretion to: accept the Proposal which it deems most advantageous and favorable in the interests of CWSP; and waive informalities in, or reject any or all Proposals, in each case without giving any notice. If only one compliant proposal is received by the closing date, CWSP reserves the right to either accept the proposal or cancel the process without further consideration of the sole submission. This includes the

right to cancel this Request for Proposal at any time before entering into a Contract with the Consultant. CWSP reserves the right to cancel at any time before the award of the Contract without being obliged to any Proponent—not just where there is only one compliant Proposal.

Proposals that contain qualifying conditions or otherwise fail to conform to these Instructions to Proponents may be disqualified or rejected. CWSP, however, may at its sole discretion reject or retain for consideration Proposals which are non-conforming because they do not contain the content or form required by these Instructions to Proponents or because they have not complied with the process for submission set out herein.

3.9 No Claim for Compensation

Except as expressly and specifically permitted in these Instructions to Proponents, no Proponent shall have any claim for any compensation of any kind whatsoever, as a result of participating in the Request for Proposal, and by submitting a Proposal each Proponent shall be deemed to have agreed that it has no claim. In no event will CWSP be responsible for the costs of preparation or submission of a Proposal.

3.10 Conflict of Interest

By submitting a Proposal, the Proponent warrants that neither it nor any of its officers or directors, or any employee with authority to bind the Proponent has any financial or personal relationship or affiliation with any elected official or employee of CWSP or their immediate families which might in any way be seen (in CWSP sole and unfettered discretion) to create a conflict. If the proponent is uncertain as to whether a conflict of interest (or perceived conflict of interest) exists, the proponent must disclose all reasonably relevant details so that CWSP may make a determination. CWSP may, at its sole discretion, reject or retain for consideration Proposals for which potential conflicts of interest are deemed to exist.

3.11 Anti-Collusion, Fraud & Corruption

The Proponent shall not communicate to any person before the opening of Proposals (other than to CWSP through the delivery of a Proposal in the prescribed manner) the amount of any Proposal, or at any time adjust the amount of any Proposal by arrangement with any other persons, make any arrangement with any other person about whether or not he or that other person should or should not submit a Proposal or otherwise collude with any other person in any manner whatsoever in the Proposal process.

Any breach of this provision or non-compliance on the part of a Proponent shall, without affecting the Proponent's liability for such breach or non-compliance, result in the Proposal's disqualification.

3.12 Confidentiality

Confidential information about CWSP obtained by Proponents must not be disclosed unless authorized to do so, in writing, by CWSP. The Proponent agrees that his obligation of confidentiality will survive the termination of any Contract awarded under this Proposal process.

3.13 Irrevocability and Acceptance of Proposal

After the Closing Date and Time, all Proposals are irrevocable. By submission of a Proposal, the Proponent agrees that should its Proposal be successful the Proponent will enter into a Contract with CWSP for the

Work on the terms and conditions set out in the Proposal. Each Proposal will be irrevocable and open for acceptance by CWSP for ninety (90) calendar days from the day following the Proposal Closing Date and Time, even if the Proposal of another Proponent is accepted by CWSP. By submission of a clear and detailed written notice, the Proponent may amend or withdraw its Proposal PRIOR to the Closing Date and Time.

3.14 Irregularities and Informalities

CWSP reserves the right, at its sole discretion, to waive minor irregularities and informalities in any Proposal and to seek clarification or additional information on any area of any Proposal when it is in the best interest of CWSP to do so.

3.15 Discrepancies or Omissions

Proponents finding discrepancies or omissions in the specifications or other documents or having any doubts about the meaning or intent of any part thereof should immediately request, in writing, clarification from Suzanne Bayley (sbayley@ualberta.ca) and/or Catriona Leven (catrionasleven@gmail.com) who will send written instructions or explanations to all parties having a set of the Proposal Documents. Any work on a Proposal done by the Proponent after the discovery of discrepancies, errors or omissions, which the Proponent fails to seek clarification about, shall be done at the Proponent's risk.

3.16 Modification of Terms/Addenda

CWSP reserves the right to modify the terms of this Request for Proposal at any time before the Closing Date and Time in its sole discretion. Written Addenda are the only means of amending or clarifying any of the information in the package. CWSP may amend or clarify the information package by issuing an Addendum. No employee or agent of CWSP is authorized to amend or clarify the content of the information package or any Addenda except by issuing an Addendum. CWSP makes no guarantee of the timely delivery of any addendum. The addenda issued before the closing of this Invitation to Proposal shall become a part of the Proposal Documents.

3.17 Liability for Errors

While CWSP has used considerable efforts to ensure an accurate representation of information in this Request for Proposal, the information contained in this Request for Proposal is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by CWSP, nor is it necessarily comprehensive or exhaustive. Nothing in this Request for Proposal is intended to relieve the Proponents from forming their own opinions and conclusions concerning the matters addressed in this Request for Proposal.

3.18 Basis of Contract Award

3.18.1 General

Proponents are hereby notified that CWSP intends to review and enter into a Contract for the Work based not only on the Proposal price, but the other factors considered essential by CWSP to provide a service for the Work being requested. Proposal evaluation may include, but is not limited to:

- Proponent's suggested approach to the work
- Professional qualifications of managerial and facilitator personnel
- Labour rates
- Other associated costs to perform the Work
- Experience with projects similar to that being contemplated in the Work
- Experience of the Proponent on past CWSP projects
- Confirmation of the Proponent's ability to facilitate project completion in accordance with the schedule
- Compliance with these terms of reference and completeness of the Proposal
- Total project cost is not to exceed \$7,000
- Proponent's understanding of CWSP requirements and expectations
- The overall value that the Proposal represents to CWSP, based on quality, service and price
- Any other value-added benefits offered by the Proponent which are not specifically addressed in this Request for Proposal.

The evaluation process will be conducted solely at the discretion of CWSP and the project-specific steering committee. CWSP may decide to utilize other criteria in the review of Proposals other than those set forth above; in particular, the price to carry out the work will not be the only or primary criterion that will be utilized by CWSP. CWSP reserves the right to make inquiries regarding any or all Proposals and to verify all information submitted by Proponents. Proponents shall be competent and capable of performing the work. Proponents may be required to provide further evidence of previous experience and financial responsibility.

CWSP reserves the right, at its discretion, to negotiate with any Proponent that CWSP believes has the most advantageous Proposal or with any other Proponent or Proponents concurrently. In no event will CWSP be required to offer any modified terms to any other Proponent before entering into a Contract with the successful Proponent, and CWSP shall incur no liability to any other Proponent as a result of such negotiations or modifications.

Proponents are advised that after receipt of Proposals and prior to award of Contract, Proponents may be required to provide CWSP with additional information concerning the Proponent or their Proposal including, but not limited to, a further breakdown of relevant components of the proposed prices.

3.18.2 Project Specific

Each compliant proposal will be evaluated based on the criteria and weighting outlined in Table 2.

Table 2. Project Scoring Criteria and Weighting

Num.	Criteria	Description	Weight
1	Value	Evaluates the overall cost and breakdown of the proposed budget.	60%
2	Project Team	Evaluates the appropriateness of the Project Team organizational chart.	

3	Technical Expertise	Evaluates the technical expertise and past experience of the Project Team.	
4	Quality and Clarity	Evaluates the proposal's overall quality and clarity.	40%
5	Reputation and Performance Record	Evaluates the reputation and past performance record of the Project Team.	
TOTAL:			100%

3.19 Definition of Contract

This Request for Proposal should not be construed as an Agreement or Contract to purchase goods or services. CWSP is not bound to enter into a Contract with the Proponent who submits the lowest-priced Proposal or with any Proponent. CWSP will be under no obligation to receive further information, whether written or oral, from a Proponent after the Proposal Closing Date and Time.

Neither the acceptance of a Proposal nor the execution of a Contract will constitute approval of any activity or development contemplated in any Proposal that requires any approval, permit or license pursuant to any federal, provincial, regional district or municipal statute, regulation or bylaw.

Notice in writing to a Proponent that it has been identified as the Consultant and the subsequent full execution of a written Agreement will constitute a Contract for the performance of the Work and no Proponent will acquire any legal or equitable rights or privileges relative to the Work until the occurrence of both such events.

3.20 Form of Contract

By submission of a Proposal, the Proponent agrees that should it be identified as the successful Proponent, it is willing to enter into a Consulting Services Agreement with CWSP within fifteen (15) days of the date of the Notice of Award. A copy of CWSP's Consulting Services Agreement is attached in Appendix A.

By submission of a Proposal, the Proponent agrees that should it be identified as the Consultant, it is willing to provide CWSP the necessary Insurance Policies and WorkSafe BC Clearance Letter within fifteen (15) days of the date of the Notice of Award.

4 APPENDIX A - Consulting Services Agreement

This AGREEMENT made this XXst day of November, 2025

BETWEEN:

Columbia Wetlands Stewardship Partners

(the CWSP)

and

[Agent Name] (person entering the agreement)

(the Agent)

WHEREAS the CWSP and the Agent have entered into an agreement (the “Agency Agreement”);

AND WHEREAS the Agent proposes to fulfill the following objectives:

1. Individually interview the members of the CWSP board to discuss and get recommendations on the CWSP Mission and Vision Statements and Goals.
2. Based on #1, propose draft wording for the Mission and Vision Statements, and Goals
3. Complete a workshop with the board to review and update as required:
 - a. Mission statement
 - b. Vision statement.
 - c. Goals and outcomes (Strategic Directions).
4. Based on workshop results develop draft updates and a plan for moving forward with updating the strategic direction document which may include but not be limited to:
 - a. Revised Mission and Vision Statements, and Strategic Directions (goals)
 - b. Briefly review and confirm requirements under CWSP charitable and society organization status, including legal society commitments under the BC Society Act.
 - c. Review and confirm RAMSAR requirements and CWWMA/NWA management plans
 - d. Define roles and responsibilities for key members of the CWSP executive and partners.
 - e. Define direction for engagement and involvement of partner organizations
 - f. Governance and operational structures
 - g. Collaboratively develop a strategic direction for CWSPs focus on projects and partnerships.
 - h. Develop a model for funding CWSP operations

This Agreement proves that the parties agree as follows:

1. The Agent agrees to prepare and deliver to the CWSP a final report by February 2, 2026, which must include, but is not limited to:

- 2.1. A summary report of Duties and Deliverables; and
- 2.2. A financial report outlining how project funds were spent.

2. The CWSP agrees to pay the Agent as follows:

- 3.1. 50% within 20 business days upon receipt of this fully signed Agreement;
- 3.2 The rest of the full amount upon receipt of the report on the duties and deliverables.

3. The Agent agrees that all the terms and conditions of the Agency Agreement apply to the use of the funds.

4. The Agent will keep all invoices, account books and records of the Programs for a period of two years.

ON BEHALF OF THE CWSP

:

Date: _____

[Dr. Suzanne Bayley, President of Columbia Wetlands Stewardship Partners]

ON BEHALF OF THE **AGENT**:

Date: _____

[Agent Signatory]