



Engineers Yukon

Request for Qualifications (RFQ) for Strategic Planning Consultant Services

June 15, 2018

1) Background

Engineers Yukon (EY) is a self-governing body of Professional Engineers that regulates and governs the engineering profession in the Yukon Territory. This is achieved by setting and maintaining high academic, experience and professional practice standards for all members. Only individuals licensed by Engineers Yukon are permitted by law to undertake and assume responsibility for engineering projects in Yukon.

EY is seeking the services of a consultant to facilitate and assist with updating the organization's strategic plan. The current plan was developed in October, 2015 and is due for review and updating in accordance with internal policy. Most of the goals of the current plan have been achieved or are on track to being achieved within a year's time.

Through this RFQ, EY is seeking a statement of qualifications from qualified consultants to assist the organization with updating and revising its strategic plan to provide direction for the next three years, through the end of 2021.

The consultant will work closely with the organization's Executive Director and its President. Additionally, there may be input from Council members, Committee Chairs and those general members who participate, however all direction will be from the Executive Director.

2) Scope of Work

The consultant will work directly with the Executive Director and staff working under the Executive Director. EY staff will assist with related logistics including notifying the members and participants, arranging space for the planning session, providing space for any meetings and communicating the results to the members.

The scope of the consultant's work includes:

- Review the current and the one previous EY strategic plans to become familiar with the content and previously-achieved goals as well as any outstanding goals.
- Review the "parking lot" items from the last Strategic Planning Session.
- Facilitate and lead a one-day planning session with the purpose of extracting from the participants the prioritized goals of the organization's next strategic plan. The participants may

include EY staff, Council members, Committee members and participants from the general membership. This session will include surveying the group for goals, assisting the group with prioritizing the goals and recording the outcomes of the session. The expected size of the group is 15-20 people.

- Create a written summary of the goals, considerations and other ideas that were discussed at the meeting and clearly identify the goals for the next strategic plan.
- Present to the EY Council and Executive Director, the draft strategic plan document.
- Participate in a meeting with the Executive Director, Council and other members to review the draft comments.
- Present to the EY Council and Executive Director, the final strategic plan document.

3) Deliverables

Deliverables will be based on the outcomes of the planning session and, possibly, subsequent communication from the Executive Director for any topics that could not be resolved during the planning session, and will include:

- A brief summary of the methodology used to update the strategic plan.
- Rough notes and photos recording the considerations and outcomes from the planning session.
- Written draft version of the strategic plan document for review and comment by the designated EY representatives.
- Final strategic plan document.

4) Schedule

The schedule milestones below are proposed and not finalized. The dates are provided to indicate the general timelines desired and final dates will be negotiated.

- Selection of Consultant – September 1, 2018
- Planning Session – October, 2018 (final date not determined). Location will be Whitehorse.
- Rough notes from Planning Session – within 5 business days of session.
- Draft strategic plan document – November 23, 2018
- Presentation of draft strategic plan document - 5 business days after providing the draft document.
- Final strategic plan document – December 14, 2018
- Presentation of the final document – January 12, 2019

5) Qualifications

- Experience developing strategic plans for business or regulatory organizations.
- Experience facilitating inclusive, collaborative processes including direct experience working with Boards of Directors and staff members of non-profit organizations and engaging members to initiate and execute strategic planning.
- Experience building consensus among participants with varying perspectives and opinions.
- Strong written and oral communication skills.
- Demonstrated ability to work collaboratively with a diverse group of stakeholders.
- Demonstrated ability to organize complex tasks and complete them in a timely manner.

6) Submission Requirements:

Submit response by July 27th, 2018 at 16:00 Pacific Time via email or hard copy to:

Engineers Yukon
312B Hanson Street
Whitehorse, Yukon Y1A 1Y6
Attention: Kimberley King, Executive Director
kking@engineersyukon.ca

Questions are to be provided in writing only, at the contact noted above.

Consultants will be evaluated based on their submissions should include:

- Statement of qualifications of the consultant responsive to the scope of this work.
- Resumes of the person(s) who will conduct the work with clear indication of who will conduct each part of the work.
- A minimum of three references from similar projects who can be contacted by EY.
- Responses are to be limited to a maximum of five (5) pages based on 11" x 8.5" pages with a minimum font size of 12. The page limit does not include personnel resumes.

Review and consideration of the responses will begin immediately after receipt. It is intended that EY will use the responses as the basis for negotiation and selection of the consultant. A subsequent request-for-proposal process will not be initiated.

7) Terms and Conditions:

- When choosing a respondent, EY will base its decision on several factors, including responsiveness of the statement of qualifications, demonstrated reputation for excellence and timeliness in performance, qualifications and capacity of consultant(s); and cost of services as negotiated subsequent to review of the qualifications.
- Engineers Yukon shall not be liable for any costs associated with the development, preparation, transmittal, or presentation of any material submitted in response to this RFQ.
- The contractor will not use any confidential or proprietary information for their own or any third party's benefit and will not disclose this information to any person who does not have a need to know.