



SPECIALIZED CONSULTING SERVICES  
BUSINESS AND ECONOMIC DEVELOPMENT

**REQUEST FOR QUALIFICATIONS**

## TABLE OF CONTENTS

<b>1. INTRODUCTION</b>	<b>3</b>
1.1 Background	3
1.2 Purpose	3
1.3 Inquiries	4
1.4 Definitions	4
<b>2. INSTRUCTIONS TO RESPONDENTS</b>	<b>5</b>
2.1 Closing Time and Address for Submissions	5
2.2 Email Submissions	5
2.3 Amendments to Submissions	5
2.4 Addenda	5
<b>3. SUBMISSION CONTENTS</b>	<b>5</b>
3.1 Submissions	5
<b>4. EVALUATION AND QUALIFICATION</b>	<b>6</b>
4.1 Evaluation Committee	6
4.2 Evaluation Criteria	6
4.3 Additional Information	6
4.4 Interviews	6
4.5 Qualification and Listing	6
4.6 Changes to List of Qualified Respondents	7
<b>5. CONTRACTING FOR SPECIFIC SERVICES</b>	<b>7</b>
5.1 Contracting with Qualified Respondent(s)	7
5.2 The Trust's Right to Contract with Others	7
<b>6. GENERAL CONDITIONS</b>	<b>7</b>
6.1 No Obligation to Proceed	7
6.2 Respondent's Expenses	8
6.3 No Claims	8
6.4 Conflict of Interest	8
6.5 Confidentiality	8
<b>SCHEDULE A - SERVICES</b>	<b>9</b>

# REQUEST FOR QUALIFICATIONS

## 1. INTRODUCTION

### 1.1 Background

Columbia Basin Trust supports efforts by the people of the Basin to create a legacy of social, economic and environmental well-being and to achieve greater self-sufficiency for present and future generations.

The Trust serves the people who live in the Basin and assists communities in addressing their needs by:

- providing resources and funding;
- focusing on local priorities and issues;
- bringing people together around key issues;
- providing useful, credible, accessible information and expertise;
- encouraging collaboration and partnerships;
- seeking ongoing input from Basin residents; and
- investing prudently in Basin power projects, businesses and real estate.

Columbia Basin Trust has developed a renewed economic development business plan to lead and support efforts to advance economic growth, job creation, innovation and entrepreneurial opportunity for a prosperous and sustainable [Basin](#) economy. Qualified Respondents may be requested to support efforts related to advisement and mentorship for growth phase businesses through the Trust's business scale-up program; the analysis, research, development and implementation of economic and business development activities and programs; and/or the assessment and development of investment projects.

For more detailed organizational information, please refer to our website at [ourtrust.org](http://ourtrust.org).

### 1.2 Purpose

The purpose of this RFQ is to:

- (a) invite submissions ("**Submissions**") from interested parties ("**Respondent**") describing the expertise and capability of the Respondent to perform one or more of the types of services listed in Schedule A (collectively, the "**Services**");
- (b) identify a list of qualified Respondents ("**Qualified Respondents**") that the Trust may contact on an as and when required basis to enter into negotiations for a contract or to respond to a request for quotations or request for proposals for support, advisement and mentorship services for the Trust's business scale-up program for a period ending December 2019; and
- (c) identify a list of qualified Respondents ("**Qualified Respondents**") that the Trust may contact on an as and when required basis to enter into negotiations for a contract or to respond to a request for quotations or request for proposals for one or more of the Services for a period ending December 2019.

The Trust has no specific target number of Respondents to be pre-qualified and the total number pre-qualified will be determined at the sole discretion of the Trust. The list of Qualified Respondents is intended to be a resource for the Trust and not to restrict the Trust's ability to contract with persons who are not listed as Qualified Respondents.

### 1.3 Inquiries

All inquiries related to this RFQ should be emailed to the person named below ("**the Trust's Representative**"). Information obtained from any person or source other than the Trust's Representative may not be relied upon.

**Name:** Leah Biln  
**Email:** lbiln@cbt.org

Inquiries and responses will be recorded and may be distributed to all Respondents at the discretion of the Trust.

Respondents finding discrepancies or omissions in this RFQ, or having doubts as to the meaning or intent of any provision, should immediately notify the Trust Representative. If the Trust determines that an amendment is required to this RFQ, the Trust's Representative will issue an addendum in accordance with Section 2.4. No oral conversation will affect or modify the terms of this RFQ or may be relied upon by any Respondent.

### 1.4 Definitions

In this RFQ the following definitions shall apply:

- (a) "**The Trust**" means Columbia Basin Trust;
- (b) "**The Trust Representative**" has the meaning set out in Section 1.3;
- (c) "**Closing Time**" has the meaning set out in Section 2.1;
- (d) "**Evaluation Committee**" has the meaning set out in Section 4.1;
- (e) "**RFQ**" means this Request for Qualifications;
- (f) "**Respondent**" has the meaning set out in paragraph 0;
- (g) "**Qualified Respondents**" has the meaning set out in paragraph 1.2(c);
- (h) "**Submissions**" has the meaning set out in paragraph 0; and
- (i) "**Services**" means the services described in paragraph 0

## **2. INSTRUCTIONS TO RESPONDENTS**

### **2.1 Closing Time and Address for Submissions**

Submissions should be received at the following email address:

**lbiln@cbt.org**

On or before the following date and time (the “**Closing Time**”):

**Date:** February 23, 2018

**Time:** 1:00 PM PT / 2:00 PM MT

### **2.2 Email Submissions**

Respondents assume the entire risk that the email will be received by the addressee and is complete, including the risk that the Trust’s system will properly receive the email and any email attachments. The Trust assumes no risk or responsibility that any email will be received.

### **2.3 Amendments to Submissions**

Respondents may revise Submissions emailed to the email address set out above, at any time prior to the Closing Time.

### **2.4 Addenda**

If the Trust determines that an amendment is required to this RFQ, the Trust’s Representative will issue a written addendum that will form part of this RFQ. No amendment of any kind of the RFQ is effective unless it is contained in a formal written addendum.

## **3. SUBMISSION CONTENTS**

### **3.1 Submissions**

Respondents should provide as part of their Submissions:

- (a) a brief statement describing the Respondent, including its full legal name, registered office address and organizational structure;
- (b) a list of the categories or specific areas of Services (See Schedule A) that the Respondent is interested in providing to the Trust;
- (c) a description of the Respondent’s skills related to the categories or areas of Services listed by the Respondent (Respondents may list one or more categories or one or more specific areas or skills. Respondents are not required to have experience in all categories or in all specific areas within any category);

- (d) with respect to the Services identified by the Respondent in response to paragraph 3.1(b), a brief description of recent contracts for similar services that the Respondent has performed, including references;
- (e) a description of the Respondent's personnel, including detailed resumes and a summary of relevant experience and qualifications for each of the proposed personnel; and
- (f) the Respondent's hourly rates or other pricing for Services and, if applicable to the Respondent, minimum contract value (if greater than \$5000) for the Services.

#### **4. EVALUATION AND QUALIFICATION**

##### **4.1 Evaluation Committee**

Submissions will be evaluated by an evaluation committee (the "**Evaluation Committee**") consisting of one or more persons appointed by the Trust. The Evaluation Committee may consult with others, including the Trust staff members and third party consultants, as the Evaluation Committee determines is required. The Evaluation Committee will give a written recommendation to the Trust for the identification of a list of Qualified Respondents by category or specific area of the Services.

##### **4.2 Evaluation Criteria**

The Evaluation Committee will evaluate all Submissions using the following evaluation criteria:

- (a) the Respondent's relevant experience, qualifications, references and reputation;
- (b) the experience and qualifications of the Respondent's personnel; and
- (c) the Respondent's hourly rates or other pricing for the Services.

##### **4.3 Additional Information**

The Evaluation Committee may, at its discretion, request clarifications or additional information from a Respondent with respect to any Submission and the Evaluation Committee may make such requests to only selected Respondents. The Evaluation Committee may consider such clarifications or additional information in evaluating a Submission.

##### **4.4 Interviews**

The Evaluation Committee may, at its discretion, invite some or all of the Respondents to appear before the Evaluation Committee to clarify their Submissions. In such event, the Evaluation Committee will be entitled to consider the answers received in evaluating Submissions.

##### **4.5 Qualification and Listing**

The Trust will notify Respondents whether or not they have been selected to be included on the Trust's list of Qualified Respondents.

#### **4.6 Changes to List of Qualified Respondents**

Notwithstanding any provision of this RFQ, the Trust may at any time, in its discretion, cancel, extend, update, add to or delete from the list of Qualified Respondents.

### **5. CONTRACTING FOR SPECIFIC SERVICES**

#### **5.1 Contracting with Qualified Respondent(s)**

The Trust may, at any time, contact one or more Qualified Respondent(s) on an as and when required basis to:

- (a) enter into discussions to attempt to negotiate a contract for one or more of the Services, the price for such contract to be based on the pricing set out in either the Qualified Respondent's Submission or an agreed-to fixed price (for example, determined by multiplying applicable hourly rates by the number of hours the Trust and Qualified Respondent agree are a reasonable estimate of the number of hours required to perform the Services); or
- (b) invite a response to a competitive procurement such as a request for quotations or request for proposals for one or more of the Services, in which the Trust may call for fixed or other contract pricing not necessarily based upon the pricing in the Qualified Respondent's Submission.

The Trust intends to select Qualified Respondents to enter into negotiations or respond to a competitive procurement for specific Services in accordance with the Trust's judgment of its best interest such as on the basis of the Qualified Respondent's availability, experience, qualifications, skill and pricing, taking into account the required Services and the duration of the engagement.

#### **5.2 The Trust's Right to Contract with Others**

Notwithstanding any provision of this RFQ, the Trust may, at any time and at its discretion:

- (a) invite service providers that are not Qualified Respondents to participate in any procurement for one or more of the Services; or
- (b) enter into a contract for one or more of the Services with a service provider that is not a Qualified Respondent,

in connection with any Services required by the Trust.

### **6. GENERAL CONDITIONS**

#### **6.1 No Obligation to Proceed**

Notwithstanding any provision of this RFQ, the Trust will have no obligation to select a list of Qualified Respondents, negotiate or enter into a contract with any Qualified Respondent or invite any Qualified Respondent to participate in a competitive procurement process for any Services.

The Trust reserves the right to reject all Submissions and to terminate this procurement process at any time.

## **6.2 Respondent's Expenses**

Respondents are solely responsible for their own expenses in preparing and submitting Submissions and for any negotiations or discussions with the Trust or its representatives and consultants relating to or arising from this RFQ.

## **6.3 No Claims**

By submitting a Submission, each Respondent:

- (a) agrees that the Trust and its Board members, employees, representatives, agents, consultants and advisors will not under any circumstances be liable for any claims, whether for costs, expenses, losses (including loss of anticipated profits), damages or liabilities which are or may be incurred or suffered by any Respondent arising from or in any way connected to this RFQ, including if the Trust breaches any express or implied term of the RFQ; and
- (b) waives any and all claims against the Trust or any of its Board members, employees, advisors, representatives, consultants or advisors.

## **6.4 Conflict of Interest**

Respondents should disclose in their Submission any potential conflicts of interest and existing business relationships they may have with the Trust. If requested by the Trust, Respondents must provide all pertinent information regarding the ownership of a corporate Respondent.

## **6.5 Confidentiality**

All submissions become the property of the Trust and will not be returned to the Respondent. All submissions will be held in confidence by the Trust unless otherwise required by law. Respondents should be aware that the Trust is a "public body" as defined by *Freedom of Information and Protection of Privacy Act* (British Columbia) and is subject to that Act.

## SCHEDULE A - SERVICES

The following is a list of areas in which the Trust may require consulting support for our efforts in economic development. Respondents should identify their areas of experience and expertise relating to the categories below using this form or a similar table. Respondents should further expand upon their identified experience and expertise in their Submission.

Expertise Category	
Program Development and Design	
Entrepreneurship	
Business Development <ul style="list-style-type: none"> <li>• Opportunity and Risk Assessment</li> <li>• Pre-Feasibility/Feasibility Studies</li> <li>• Business Plan Development</li> <li>• Financial Plan Development</li> </ul>	
Business Start-up	
Business Growth/Scale-up	
Executive in Residence	
Business Advisement/Consulting	
Business Mentorship	
Sector Specific Business Expertise	
Business Succession	
Investment <ul style="list-style-type: none"> <li>• Origination</li> <li>• Evaluation</li> <li>• Risk Assessment</li> <li>• Deal Structuring</li> </ul>	
Impact investment	
Venture Capital	
Angel Investment	
Regional Trade Marketing	
Workforce Development	
Understanding of Columbia Basin Trust Region	
Additional areas of experience and expertise	

\*As noted in Section 3.1(b) of the RFQ, Respondents are not required to have experience in all categories or in all specific areas within any category.