

Request for Proposals  
Co-operative Development Fund Corporation Review

November 29, 2024

Issued by:



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1. Introduction

This Request for Proposals (the RFP) is an invitation by the Newfoundland & Labrador Federation of Co-operatives (NLFC) to submit proposals for the provision of professional services as further described in section (4.2) Scope of Work and Deliverables.

The NLFC represents the co-operatives and credit unions that comprise the co-op sector of the province. The mandate of the NLFC is to promote the co-operative business model while supporting the growth and development of the overall sector.

The NLFC is seeking proposals from qualified and experienced suppliers to conduct a review of its Co-operative Development Fund Corporation (CDFC), a subsidiary of the NLFC. An assessment of the fund’s history and relevance is required along with the creation of policy and loan program redesign, complete with communications strategy. The objective of this review is to develop a working loan program for new and expanding co-operatives to support the growth and development of the co-op sector in the province.

1.1 RFP Contact

For this procurement process, the RFP Contact shall be:

Dave Walsh, Managing Director  
Newfoundland & Labrador Federation of Co-operatives  
[dave@nlfc.coop](mailto:dave@nlfc.coop) | 709-699-1110

Proponents and their contacts are not permitted to contact any employees, officers, agents, elected or appointed officials, or other representatives of NLFC, other than the RFP contact or their designate, concerning this RFP. Failure to adhere to this rule may result in the disqualification of the proponent and the rejection of the proponent’s proposal.

1.2 Type of Contract for Deliverables

The selected Proponent will be required to enter into an agreement with NLFC for the provision of the professional services outlined in 4.2.

1.3 RFP Timetable

Issue Date of RFP	Nov 29, 2024
Submission Deadline	Dec 30, 2024
Anticipated Execution of Agreement	Jan 21, 2024
Anticipated Project Completion Date	Aug – Oct 2025

2. Submission of Proposals

2.1 Proposals to be Submitted at the Prescribed Location

Proposals must be submitted at:

Newfoundland & Labrador Federation of Co-operatives  
[dave@nlfc.coop](mailto:dave@nlfc.coop)  
Attn: Dave Walsh, Managing Director

## 2.2 Proposals to be Submitted on Time

Proposals must be submitted to the email set out above on or before the Submission Deadline as indicated in Section 1.3. The proponent is solely responsible for the submission of its proposal to the exact email location indicated in the RFP on or before the submission deadline. NLFC does not accept any responsibility for proposals emailed or delivered to any other location other than those prescribed in section 2.3. Proposals submitted after the deadline will be rejected. NLFC's time clock will be deemed to be correct.

## 2.3 Proposals to be Submitted in Prescribed Format

Proponents should submit their proposals containing one (1) electronic copy saved as a portable document format (PDF) to [dave@nlfc.coop](mailto:dave@nlfc.coop). The file name on the electronic copy should include an abbreviated form of the proponent's name. Unless specifically requested in their solicitation document, proponents should not submit product catalogues or other marketing materials with their bid.

## 2.4 Withdrawal of Proposals

Proponents may withdraw their proposals before the submission date. To withdraw a proposal, a notice of withdrawal must be received by the RFP contact by email before the submission deadline and must be signed by an authorized representative of the proponent. NLFC is under no obligation to return withdrawn proposals.

# 3. Evaluation of Proposals

NLFC will evaluate the proposals based on the proponent's responsiveness to weighted criteria outlined below and pricing. NLFC reserves the right to:

- Reject any or all offers and discontinue this RFP process without obligation or liability to any proponent.
- Accept a proposal other than the lowest priced proposal; and
- Award a contract based on initial offers received, without discussion or request for best and final offers.

## 3.1 Rated Criteria

The following is an overview of the rated criteria used for submission evaluations. Proponents who do not meet a minimum threshold score for a category will not proceed further in the evaluation of rated criteria and pricing.

Rated Criteria Category	Weighted (Points)	Minimum threshold
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**WORK**

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Understanding of the project scope and peripheral problems	15	9
Proposed approach and methodology	15	9
Proposed Schedule	10	6
<b>WORK TOTAL</b>	<b>40</b>	<b>24</b>
<b>STAFF</b>		
Proposed project manager	10	6
Proposed Personnel	10	6
<b>STAFF TOTAL</b>	<b>20</b>	<b>12</b>
<b>COMPANY</b>		
Corporate capacity	10	6
Corporate experience	10	6
General format and appearance	5	2
<b>COMPANY TOTAL</b>	<b>25</b>	<b>15</b>
<b>TOTAL POINTS</b>	<b>85</b>	<b>51</b>

### 3.1.1 Understanding of the Project Scope and Peripheral Problems

Provide a one to two-page summary of your understanding of the requirements defined in this RFP. Identify any potential challenges you foresee in delivering the scope of work. This context should be expressed in your own words and communicate your understanding of the services required.

### 3.1.2. Proposed Approach and Methodology

Describe the approach and/or process you propose to address the RFP requirements. Include any notable methodologies, tools and techniques, and their respective suitability to this project. Briefly describe how the engagement proceeds from beginning to end.

### 3.1.3 Proposed Schedule

Provide a project schedule that reflects your proposed approach/process and demonstrates your ability to meet the milestones within the project timeline. Itemize project milestones, deliverables, and engagement points throughout the project schedule.

### 3.1.4 Proposed Project Manager

The successful Proponent will provide all the necessary project management needed to complete the services proposed in response to this RFP. Identify the Project Manager proposed for this project and describe their experience.

Include the Project Manager's resume. This should be structured to emphasize their relevant qualifications and experience successfully managing projects of similar size and scope to that required by this RFP. The resume should include at least two project references, including:

- Name of organization.
- Name, title, telephone number, and email of the contact for the organization; and
- A brief description of the scope, complexity, dates, and duration of the project.

### 3.1.5. Proposed Personnel

The Proponent should be able to demonstrate that its proposed team as a whole meets or exceeds the RFP requirements. Provide individual resumes for each proposed resource. The resumes should be structured to emphasize their relevant qualifications and experience in completing projects of similar size and scope to that required by this RFP. Each resume should include at least two project references where the proposed individual served in a similar role, including:

- Name of organization.
- Name, title, telephone number, and email of contact for the organization.
- Brief description of the scope, complexity, dates, and duration of the project; and
- The role the proposed individual played in the referenced project.

### 3.1.6 Corporate Capacity

The Proponent should provide corporate information to demonstrate the company has sufficient human resources and facilities to complete the assessment on time and budget. The proponent should also provide corporate experience.

### 3.1.7 General Format and Appearance of the Proposal

Proponent responses to this RFP should reflect the professional nature of the services required and should effectively communicate how the consultant(s) will deliver on the requirements of this RFP as concisely as possible.

## 3.2 Pricing

Proposal evaluations will consist of scoring the submitted pricing of compliant proposals. Pricing is worth 15 points of the total score. Each Proponent will receive a percentage of the total possible points allocated to price for their proposal, which will be calculated by dividing that Proponent's price into the lowest bid price submitted.

For example, if a Proponent bids \$120.00 for the project and that is the lowest bid price, that Proponent receives 100% of the possible points for that category ( $120/120 = 100\%$ ). A Proponent who bids \$150.00 receives 80% of the possible points for that category ( $120/150 = 80\%$ ), and a Proponent who bids \$240.00 receives 50% of the possible points for that category ( $120/240 = 50\%$ ).

Lowest rate

----- x Total available points = Score for second-lowest rate

Second-lowest rate

Lowest rate

----- x Total available points = Score for third-lowest rate

Third-lowest rate

And so on, for each proposal.

Bidders should propose a financial model that clearly defines how they propose to be compensated for all the required services. **The maximum level of effort associated with this project is \$55,000 excluding applicable taxes.**

## 4. RFP Particulars

### 4.1 Project Background

The Co-operative Development Fund (CDFC), sometimes referred to as the “Fund” is a subsidiary corporation of the Newfoundland and Labrador Federation of Co-operatives (NLFC). It is a non-profit corporation (corporation without share capital) incorporated on December 29, 1988, under the province’s Corporations Act of the day. Its members are the Board of Directors of the Newfoundland and Labrador Federation of Co-operatives. The Fund has been used to implement various programs, all attempting to fulfill the original, overall mandate of advancing and promoting the growth of new and emerging co-operatives in Newfoundland and Labrador.

Recognizing the potential co-operatives have for rural economic development, the government of Newfoundland & Labrador and the NLFC have both invested \$500,000 in the CDFC for a total \$1 million fund.

Access to capital is a common challenge for many co-operatives and a fund specifically designed for a growing co-op sector is essential to thrive and flourish. This review will have three steps; examine the current fund’s relevance and its inner workings against similar jurisdictional and national programming; the development of a program design and policies; and the creation of a communications strategy.

The purpose of this review is to determine the current capacity and demand for the CDFC, evaluate the fund relevance in today’s market and to create appropriate policies and procedures to encourage its use, combined with an outbound communications plan to attract new and expanding co-ops. The results of this review will be crucial in shaping the growth the of the co-operative sector in the province.

## 4.2 Scope of Work and Deliverables

The NLFC are seeking the services of a qualified consultant to conduct an in-depth analysis and review of the CDFC and to provide a communication plan outline to promote the fund.

This review will identify and investigate the opportunities and limitations of the CDFC for co-operative development in Newfoundland & Labrador.

The successful proponent will undertake the following scope of work:

- Conduct research to confirm market demand and identify deficiencies of the CDFC, including:
  - Review and analysis of the fund's historical documents including by-laws, contracts, agreements, policy manuals, etc.
  - Jurisdictional and national scan of similar programs in the province and the country identifying the gaps, limitations, and barriers to the use and growth of the CDFC.
  - Review of the funds relevancy in today's co-operative sector.
  - Quantify existing opportunities for growth.
- Using information gained from the research portion; the development of a loan program design, with policy manual and recommendations for a mechanism of operation including eligibility requirements, adhering to the CDFC by-laws.
- Creation of a communications strategy to promote the fund through NLFC and NL Government channels.