COMMUNITY FUTURES PAN WEST NETWORK INC.

REQUEST FOR PROPOSALS

Phase One: Board Development Program Curriculum Modernization

RFP information	Details
RFP issued by	Community Futures Pan West Network
Maximum professional fee	$25,000 Canadian plus applicable GST
Proposal submission deadline	Friday, September 18, 2026, at 4:00 p.m. Mountain Daylight Time
Anticipated project kickoff	October 7, 2026
Anticipated completion	No later than March 15, 2027
Submission contact	Colette Close, Executive Director leadership@communityfuturespanwest.ca

1. RFP Summary

Community Futures Pan West Network Inc. (Pan West) invites concise proposals from qualified consultants or curriculum content developers to create an entirely new Phase One curriculum for the modernization of its Board Development Program. The engagement includes professional advice on the curriculum framework and learning sequence, followed by development of complete written curriculum and supporting facilitator and participant materials.

Pan West is seeking a practical, cohesive and engaging curriculum that serves Community Futures directors and can be delivered live, either virtually or in person. The work must be completed and approved no later than March 15, 2027. The maximum professional fee is $25,000 plus applicable GST.

The four provincial Community Futures associations in British Columbia, Alberta, Saskatchewan and Manitoba will distribute this RFP to qualified consultants within their networks. The provincial associations are not being invited to submit proposals.

2. About Community Futures Pan West Network Inc.

Community Futures Pan West Network Inc. is the western Canadian network organization serving the Community Futures network across British Columbia, Alberta, Saskatchewan and Manitoba. Pan West supports collaboration, knowledge sharing, training and coordinated initiatives across the four provincial networks.

Pan West's Board Development Program has historically offered 15 governance training modules for Community Futures boards. The program has been well used, but its existing structure and three-hour module format no longer fully reflect current learning preferences, governance needs or the range of delivery options available.

3. Project Background

Pan West has reviewed its existing Board Development Program, participant feedback, delivery experience and options for modernization. The review confirmed the need for shorter, more flexible and engaging learning that provides a clear pathway for directors while preserving opportunities for practical discussion and application.

Pan West will provide the successful consultant with its current 15 modules and other relevant resources as background and reference materials. This engagement is not a request to lightly revise, reorganize or preserve the existing module catalogue. The successful consultant may draw on suitable existing information, but must create new, cohesive curriculum content based on current adult-learning and governance practices.

4. Project Purpose and Objectives

Phase One will create two connected curriculum components:

1. A Community Futures orientation, primarily for new Community Futures directors. Community Futures staff may also participate.
2. General governance curriculum suitable for both new and experienced directors. It must also be accessible to Community Futures staff and should be capable of broader use by community members and representatives of other nonprofit organizations.

The Community Futures orientation will be specific to the Community Futures Program. The general governance curriculum should be broadly relevant and adaptable beyond the Community Futures network.

The objectives of the engagement are to:

- establish a clear and logical Phase One curriculum framework and learning sequence;
- create complete, accurate and engaging written curriculum for adult learners;
- support effective live virtual and in-person delivery;
- provide practical activities, examples and tools that help participants apply learning; and
- deliver editable source materials that Pan West can revise, reproduce, distribute, deliver and later adapt for technology-based learning.

5. Phase One Scope

5.1 Professional curriculum guidance

Pan West has identified preliminary ideas but is seeking the consultant's professional guidance. The consultant must review the available background materials and recommend the most effective:

- curriculum framework and learning sequence;
- number and grouping of modules;
- module titles and scope;
- length and format of each module;
- relationship between the Community Futures orientation and the general governance curriculum; and
- approach to delivery, engagement and assessment.

Possible subject areas discussed during planning include Community Futures orientation, governance roles, legal duties, financial literacy, accountability, and board/staff roles and boundaries. These are preliminary subject areas, not a prescribed final module list.

5.2 Curriculum design expectations

- Modules should be shorter than the current three-hour format.
- Materials must be flexible, practical and engaging for adult learners.
- Content must be suitable for facilitated live virtual or in-person delivery.
- The consultant should recommend appropriate delivery formats and timing by topic.
- The curriculum should include relevant Community Futures examples and case studies without making the general governance content unusable outside the network.
- Materials must be structured so they can be adapted to a digital learning environment through a separate future project.

6. Anticipated Future Phases and Excluded Work

The following work is expressly outside the scope of this RFP:

- advanced or specialized Community Futures-specific modules contemplated for a future phase;
- digital course construction;
- video production or interactive digital lesson production;
- completion tracking, dashboards or automation; and
- technology-platform configuration or implementation.

A possible future phase may address Community Futures-specific topics such as strategy and performance, risk and compliance, board culture, Community Futures oversight, lending governance and community economic development. These examples are provided only to distinguish possible future work; they are not deliverables under this RFP and do not represent a final approved curriculum structure.

7. Required Deliverables

Deliverable	Minimum requirement
1. Recommended curriculum framework	A documented Phase One framework and learning sequence, including recommended module groupings, titles, scope, length, format, relationship between the orientation and general governance content, and rationale for the recommendations.
2. Complete written curriculum	Complete, original curriculum content for all approved Phase One components.
3. Learning objectives	Clear and measurable learning objectives for each component or module.
4. Facilitator materials	Facilitator guides with timing, preparation, delivery notes, activities, discussion guidance and supporting references, as appropriate.
5. Participant materials	Participant guides, handouts, worksheets and other materials required to participate in and apply the learning.
6. Examples and case studies	Relevant Community Futures examples and case studies, together with broadly applicable governance examples where appropriate.
7. Activities and discussion questions	Practical activities, reflection prompts and facilitated discussion questions that support application.
8. Assessments or knowledge checks	Appropriate learning assessments, knowledge checks or other methods to confirm understanding.
9. Delivery recommendations	Recommendations for effective live virtual and in-person delivery, including suggested timing and facilitation considerations.
10. Final editable source files	All approved final materials in commonly used, fully editable source formats, together with any supporting files needed for Pan West's unrestricted future use and adaptation.

8. Project Governance and Review Process

The Executive Director of Community Futures Pan West Network Inc. will be the consultant's primary contact and will oversee the project, coordinate communication and consolidate feedback. The Pan West Board will provide direction at the formal review points and make final approval decisions.

The engagement will include progress meetings with the Executive Director. The exact frequency and meeting schedule will be confirmed at kickoff.

The following three formal review and approval stages are required:

Stage	Submission and approval
1. Proposed curriculum framework	Consultant submits the recommended framework, sequence, module structure, scope, length and delivery approach for Board review and approval before full content development proceeds.
2. Complete draft curriculum	Consultant submits the complete draft curriculum and all supporting facilitator and participant materials for coordinated review and Board approval.
3. Final revised curriculum	Consultant addresses approved feedback and delivers the final curriculum, supporting materials and all editable source files for final Board approval.

The consultant must allow reasonable time within the work plan to respond to consolidated feedback at each stage. Pan West will seek to provide coordinated feedback promptly. Material changes beyond the approved scope will be addressed through a written change process agreed by both parties.

9. Budget and Payment Schedule

The maximum professional fee for the complete engagement is $25,000 plus applicable GST. The proposed fixed fee must include all consultant costs and expenses. Pan West will not reimburse additional travel, subcontractor, software, administrative or other expenses unless expressly approved in writing through a contract amendment.

Payment	Milestone
20%	Upon contract signing and project kickoff.
30%	Following Board approval of the proposed curriculum framework.
50%	Following final approval and delivery of all completed materials and editable source files.

Payments are tied to Pan West's approval of the applicable milestone, not merely to the consultant's submission of materials. Following each approved milestone, the consultant will submit an invoice, plus applicable GST, to the Executive Director, and Pan West will pay the consultant directly within 30 days of receiving the invoice.

10. Procurement and Project Timeline

The following schedule is proposed and may be adjusted by Pan West through written notice:

Activity	Proposed date
RFP distributed by the four provincial associations	By August 31, 2026
Deadline for written questions	Friday, September 11, 2026
Proposal submission deadline	Friday, September 18, 2026, at 4:00 p.m. Mountain Daylight Time
Board review and selection decision	Completed by October 2, 2026
Successful consultant notified	Monday, October 5, 2026
Contract finalized and project kickoff	Wednesday, October 7, 2026
Framework review and approval	By November 30, 2026
Complete draft curriculum review and approval	By Friday, February 26, 2027
Final completion and Board approval	No later than March 15, 2027
Internal testing by Pan West and provincial associations	After completion of the consultant's work

Internal testing after the consultant's work is complete is a Pan West and provincial-association activity and is not a consultant deliverable under this RFP unless the parties later agree otherwise in writing.

11. Consultant Qualifications

Direct knowledge of and experience with the Community Futures Program is preferred and will receive meaningful weight in the evaluation. A consultant without direct Community Futures experience may be considered if the proposal demonstrates strong governance curriculum-development expertise and a credible, efficient approach to understanding the Community Futures context.

Proponents should demonstrate:

- experience developing curriculum or educational content;
- knowledge of nonprofit or community-based governance;
- experience writing practical and engaging adult-learning materials;
- ability to work collaboratively with organizational leaders, boards and subject-matter experts.

12. Proposal Requirements

Proposals should be concise and must not exceed eight pages, excluding consultant résumés and work samples. The proposal should include:

- a brief statement demonstrating understanding of the project;
- the proposed approach, work plan and curriculum-development process;
- a proposed schedule confirming completion by March 15, 2027;
- relevant curriculum-development and governance experience;
- knowledge of the Community Futures Program or a proposed approach to developing that understanding;
- a brief biography of the consultant and each proposed team member, including roles;
- one or two examples of comparable work, provided as links, brief samples or attachments;
- a detailed fixed-price budget not exceeding $25,000 plus applicable GST, including all costs and expenses;
- two relevant client references;
- disclosure of any actual or potential conflict of interest; and
- confirmation of availability and capacity to complete the engagement within the required timeline.

Pan West may request clarification or additional information and may invite one or more proponents to an optional virtual meeting before making its final selection. An interview is not a mandatory stage of this process.

13. Submission Instructions

Submit proposals electronically in PDF format to:

leadership@communityfuturespanwest.ca
Attention: Colette Close, Executive Director
Subject line: Phase 1 Board Development Curriculum RFP
Deadline: Friday, September 18, 2026, at 4:00 p.m. Mountain Daylight Time

Proponents are responsible for ensuring that their proposal is received before the deadline. Pan West may, in its discretion, consider or reject a late proposal.

14. Questions and Clarification Process

Questions about this RFP must be submitted in writing to Colette Close, Executive Director, at leadership@communityfuturespanwest.ca by Friday, September 11, 2026. Pan West may share

responses to material questions with all known recipients of the RFP, without identifying the person or organization that asked the question.

15. Evaluation Criteria

Proposals will be evaluated for best overall value using the following proposed criteria:

Criterion	Weight
Understanding, approach and work plan	30%
Relevant curriculum and governance experience	20%
Knowledge of the Community Futures Program	25%
Qualifications, comparable work and references	10%
Budget and overall value	15%
Total	100%

Pan West is seeking the proposal that offers the best overall value and is not obligated to accept the lowest-priced proposal or any proposal.

16. Ownership and Intellectual Property

All work created specifically under the resulting contract—including research, frameworks, curriculum content, learning objectives, activities, assessments, facilitator materials, participant materials, examples, case studies and editable source files—will become the exclusive property of Community Futures Pan West Network Inc. upon creation, subject to full payment under the contract.

Pan West will have the unrestricted, perpetual right to revise, reproduce, distribute, deliver, translate and adapt the materials, including adaptation for future technology-based learning. Except for pre-existing materials expressly identified and approved in writing before use, the consultant will retain no ownership, licensing, publication, distribution or reuse rights in work created under the contract.

Any pre-existing consultant material proposed for inclusion must be clearly identified in the proposal or before inclusion, together with all applicable licence terms. Pan West may require its removal or require a perpetual, royalty-free, transferable and sublicensable licence broad enough to support Pan West's intended use. The consultant must not incorporate third-party content unless it has secured and documented all required rights and Pan West has approved its inclusion.

17. Confidentiality and Information Handling

The successful consultant must keep confidential all non-public information received through the engagement and use it only to perform the contracted work. Confidential information must be protected using reasonable safeguards and returned or securely destroyed on request, subject to legal record-retention requirements.

The consultant must obtain Pan West's written approval before using confidential project information in any publication, presentation, portfolio, marketing material or case study. The final contract may include additional privacy, security and records-handling requirements appropriate to the information shared.

18. Conflict of Interest

Proponents must disclose any actual, potential or perceived conflict of interest involving Pan West, a provincial Community Futures association, a Community Futures organization, a proposed team member or another client. If a conflict arises during the procurement or engagement, it must be disclosed promptly. Pan West may require an acceptable mitigation plan or may disqualify a proposal or terminate the engagement where a conflict cannot be appropriately managed.

19. Pan West's Rights and Reservations

Pan West reserves the right, in its sole discretion, to:

- amend, suspend, cancel or reissue this RFP;
- extend or change any deadline by written notice;
- seek clarification or additional information from any proponent;
- waive a minor irregularity or reject a proposal that does not comply with a material requirement;
- verify information and contact references;
- invite one or more proponents to an optional virtual meeting;
- negotiate scope, schedule, deliverables, price and contract terms with a preferred proponent;
- discontinue negotiations and approach another proponent;
- accept all or part of a proposal;
- select the proposal offering the best overall value, or select no proposal; and
- use internal or external advisors to support the evaluation, subject to appropriate confidentiality.

This RFP is an invitation to submit proposals and is not a tender or an offer to enter into a contract. No legal obligation will arise until Pan West and the successful proponent sign a written contract. Proponents are responsible for all costs incurred in preparing and submitting a proposal and participating in the selection process.

20. Proposed Contract Terms

The successful proponent will be required to enter into a written agreement acceptable to Pan West. The agreement is expected to address the following matters:

Term	Expected treatment
Scope and deliverables	Approved scope, deliverables, schedule, review stages and acceptance requirements.
Fixed fee and payment	A fixed fee within the stated maximum, invoicing requirements and milestone payments.
Change control	No material change to scope, schedule, fee or deliverables without prior written agreement.
Independent contractor	The consultant acts as an independent contractor and is responsible for its personnel, taxes, remittances and business expenses.
Personnel and subcontracting	Named key personnel may not be replaced, and work may not be subcontracted, without Pan West's prior written approval.
Intellectual property	Assignment of ownership and delivery of editable source files as described in this RFP, including appropriate treatment of pre-existing and third-party materials.

Term	Expected treatment
Originality and rights	A warranty that deliverables are original or properly licensed and do not knowingly infringe third-party rights.
Confidentiality and privacy	Protection and permitted use of confidential, personal and organizational information.
Accessibility and usability	Materials delivered in a practical, readable format and designed with reasonable accessibility considerations for future delivery.
Termination	Pan West's right to terminate for material breach and on reasonable notice, with payment limited to accepted work completed to the termination date.

The final contract may include other terms reasonably required by Pan West. Submission of a proposal confirms the proponent's willingness to negotiate and sign a written agreement substantially consistent with this RFP.

21. RFP Contact

Colette Close
Executive Director
Community Futures Pan West Network Inc.
leadership@communityfuturespanwest.ca

Appendix A — Current Board Development Program Modules (Background and Reference Only)

The following summarizes Pan West's current 15 Board Development Program modules. These are provided for background and reference only. As set out in Section 3, this is not a revision project—the consultant is expected to design a new, cohesive Phase One curriculum informed by, but not limited to, this existing content.

Module 1: Community Economic Development

Introduces community economic development (CED)—its objectives, principles and strategies—the importance of community engagement and accountability, how CED differs from other development approaches, and Community Futures' role in CED.

Module 2: Operations—Board and Staff

Examines the five major Board leadership functions (decision maker, advisor, trustee, perpetuator and leader), the distinction between board and management authority and accountability, and board organization and structure.

Module 3: Legal Responsibilities of Boards

Familiarizes directors with the legal framework for nonprofit organizations, where to find and apply governing legal guidelines, sources of director liability, and how boards can protect themselves.

Module 4: Financial Management of a Non-Profit

Covers board roles in financial management, establishing accountability for plan objectives, the financial reports used to measure performance, and the role of audits in maintaining accountability.

Module 5: Board Development and Performance

Examines the role and accountability of the board, the importance of board performance and ongoing director development, and the value of a formal board assessment process.

Module 6: Community Futures Lending

Covers the roles, responsibilities and functions of the loans committee (accountable to the board), the economic and social climate in which Community Futures lending takes place, key elements of lending decisions affecting portfolio performance, and strategies for managing problem accounts.

Module 7: Management, Recruitment, Performance, Evaluation and Development

Covers management recruitment and selection, establishing an equitable compensation package for the Executive Director, the board's role in performance planning and evaluation, and using coaching and counselling to address performance concerns.

Module 8: Board Leadership

Helps participants evaluate their own leadership skills, recognize leadership as a fundamental board responsibility, and understand the three modes of governance and the principles of governance as leadership.

Module 9: Cultural Awareness

Explores Canada's cultural diversity resulting from immigration, methods of connecting and communicating with the whole community, and the board's and Executive Director's role in cultural awareness leadership.

Module 10: Advances in the Social Economy

May be delivered or downloaded free by a Community Futures General Manager, or delivered by a Board Development Program facilitator at cost. Covers the concept of the social economy, its links to community economic development, characteristics of social enterprises, and Community Futures' role in and financing of the social economy.

Module 11: Role of Planning

Provides a high-level overview of strategic and operational planning within the total planning cycle and the board's role in the planning process. Boards are encouraged to continue the planning discussion at the board table following this session.

Module 12: The Role of the Chair

Examines the Chair's roles and responsibilities toward the public, stakeholders, partners, funders, the corporation, board members and staff, and the skills required to chair effectively.

Module 13: Strategic Loan Fund Management

Covers the Community Futures lending vision and its role in community economic development, the roles of the loans committee, board and management in the loan process, and tools for monitoring loan portfolio health.

Module 14: Is Your Community Futures Prepared for Natural and Economic Disaster?

May be delivered or downloaded free by a Community Futures General Manager, or delivered by a Board Development Program facilitator at cost. Covers types of business-disruptive events, disaster preparedness planning, supporting loan portfolio businesses, the Community Futures organization's role in disruptive events, stakeholder engagement, and related board policy development.

Module 15: Volunteer Attraction, Retention and Succession

Explores the importance of volunteers to Community Futures and covers strategic board succession planning; volunteer attraction, retention, training and development; board recruitment and orientation; and using board and director assessment to strengthen the organization.