



REQUEST FOR PROPOSAL

Development of Staff Training Modules for Client Services, Case Management, and Program Administration

Inquiries or questions may be directed to:

Sharon Sawchuk, Director of Operations
ssawchuk@rupertsland.org

All proposals must be directed to:

Sharon Sawchuk, Director of Operations
ssawchuk@rupertsland.org



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1.0 INTRODUCTION

Rupertsland Institute (RLI) is an affiliate of the Otipemisiwak Métis Government (OMG) and a provincial leader in advancing education, training, and research for Alberta Métis citizens. Since 2010, RLI has managed federal and provincial agreements in education, employment, and training while supporting Métis culture, identity, and lifelong learning.

Guided by the Alberta Métis Education, Training and Research Strategy (AMETS), RLI delivers programming across four key pillars: Lifelong Learning; Enhanced Client Services; Research, Policy, and Informed Practice; and Partnerships and Shared Responsibility.

RLI operates service centres, mobile employment units, and specialized education programs across Alberta.

More information about Rupertsland Institute can be found at: www.rupertsland.org

1.1 Background Information

The purpose of this RFP is to engage a qualified proponent to design, develop, and implement comprehensive, role-based online staff training modules that strengthen service consistency, compliance, and operational effectiveness across RLI.

2.0 OPPORTUNITY SUMMARY

The successful proponent will design and develop practical, applied training aligned with RLI manuals, policies, and funding agreements.

Training areas include:

- **Client Services and Employment Counselling** – client assessments, barrier identification, action planning, employment counselling, and pathways to education, training, and employment.
- **Case Management and Internal Database Training** – accurate data entry, file documentation, client lifecycle management, reporting, and audit readiness.
- **Management and Program Administration** – program and project management, financial data management, compliance, internal controls, supervision, and quality assurance.

3.0 RFP SCHEDULE

Request for Proposal Issued:	January 21, 2026
Last day for questions/clarifications:	January 30, 2026
Submissions due:	February 13, 2026
Interview period:	February 19, 2026
Contract award:	February 25, 2026

4.0 INSTRUCTIONS

All proposals should be delivered electronically, in PDF file format to: Sharon Sawchuk, Director of Operations at ssawchuk@rupertsland.org

Proposals must be received on or before the Closing Time of: 5:00 PM MST

Proposals will be accepted until the closing time as specified and is the proponent's sole responsibility to ensure it is submitted before the above closing time.

Proponents wishing to make changes to their proposals after submission but prior to the closing time, may do so by submitting the revisions by email. It is the proponent's sole responsibility to ensure the revisions are received prior to the closing time.

4.1 Proposal Process

RLI will evaluate proposals based on the content that is requested and outlined. If questions arise during the evaluation process, RLI will work towards a timely turnaround to keep the process moving forward.

A final decision will be made by end of day February 25, 2026, after which a contract will be determined upon by both parties.

4.2 Evaluation Criteria

Proposals will be evaluated using the following weighted criteria:

- Understanding of scope and objectives – **20%**
- Relevant experience and qualifications – **20%**
- Quality and feasibility of approach – **25%**
- Moodle and technical capacity – **15%**
- Budget and value for money – **15%**
- References – **5%**

At its sole discretion, RLI reserves the right to:

- Reject any or all Proposals whether complete or not;
- Reject any Proposal it considers not in its best interests;
- Waive any minor irregularity or insufficiency in the Proposal submitted;
- Not be liable for misunderstandings or errors in the Request for Proposals;
- Issue addenda to the Request for Proposals;
- Contact references provided by the Proponents;
- Retain independent persons or contractors for assistance in evaluating Proposals;
- Request points of clarification to assist in evaluating Proposals;
- Negotiate changes with the successful Proponent; and
- Withdraw the Request for Proposal.

Proposals will be evaluated based upon the following criteria:

Company and Project Team Qualifications

- Experience delivering employment counselling and workforce development training.
- Experience developing case management and data systems training.
- Experience with project management and financial management training.
- Knowledge of Indigenous employment and training programs.
- Proven experience developing and implementing Moodle-based training.

Services

- Demonstrated understanding of requirements, scope of work and deliverables.
- Clarity and complete understanding of a solution.
- Addressing work effort and team member participation and role in delivering work.
- Identifying any potential options or changes to outlined requirements that could be advantageous to RLI.
- Ability to meet required timelines.

While all proposals will be acknowledged, RLI is a Métis organization and preference may be given to a Métis-led proposal.

5.0 CONFIDENTIALITY

MUTUAL CONFIDENTIALITY AGREEMENT BETWEEN RLI AND THE CONSULTANT

During these discussions, RLI and the Consultant may have access to confidential information of each other, including, without limitation, customer lists, financial information, business plans, trade secrets, proprietary methods, or technical processes ("confidential information"). Confidential information does not include information which either company can prove to a reasonable certainty:

- a) is or became publicly available without breach of this Agreement;
- b) was known to the other party, at the time of disclosure, as demonstrated by written evidence;
- c) was independently developed by either party without any use of any Confidential Information;
- d) becomes known to one party, without restriction as to confidentiality, from a source other than the other party, without breach of this Agreement; or
- e) is required by law to be disclosed.

5.1 Use of Confidential Information

RLI and the Vendor will:

- a) not use, disclose, or permit the use or disclosure of any confidential information to third parties;
- b) ensure that the confidential information of the client is disclosed only to the extent required for fulfilling each party's respective obligations hereunder;
- c) disclose confidential information only to those of its directors, officers, employees, consultants, or agents who need to have the information to perform their obligations in relation to these deliberations, and have executed to written agreements to protect Confidential Information materially similar to this Agreement; and
- d) exercise commercially reasonable and diligent efforts to protect the secrecy of the Confidential Information of each other and notify the client immediately upon any actual or suspected misuse, misappropriation, or unauthorized disclosure.

5.2 No Contract

This RFP is not a tender and does not commit RLI in any way to select a preferred proponent. By submitting a proposal and participating in the process as outlined in this RFP, proponents expressly agree that no contractual, tort or other legal obligation of any kind is formed under or imposed on RLI by this RFP or submissions prior to the completed execution of a formal written Contract.

6.0 ACCEPTANCE OF PROPOSAL

An acceptance of a proposal will be made in writing and will be sent to the successful proponent at the email address given in the submission process. Following acceptance and approval to proceed with the proposal, the proponent is expected to enter a contract with RLI to perform the work or services set out and agreed upon in the proposal.

6.1 Proposal Content

The proponent will structure the proposal to provide necessary information as outlined in this RFP and the following information:

- Proponent overview and qualifications
- Relevant experience and examples of similar work
- Proposed approach and methodology
- Detailed work plan and timelines
- Moodle course development and testing approach
- Project team roles and responsibilities
- Detailed fixed-price budget
- Confirmation of Moodle-only, asynchronous delivery
- Confirmation that contractor delivery is limited to testing only
- References (minimum two)

6.2 Company Overview

The proposal will outline a general overview of the company, structure, size, and capability to perform the work required. This section should specifically highlight recent and relevant experience that demonstrates the company's suitability to undertake the scope of work and their ability to commit the necessary resources to make this work a priority.

6.3 Team and Experience

The proposal must identify the work experience, educational backgrounds and skills of each team member that will perform the work. This section will outline the team structure (i.e. roles, titles, department) and organization of services provided.

7.0 PROPOSED PROJECT AND SERVICES SOLUTION

The proposal will demonstrate an understanding of the scope of work and will provide a solution that meets or exceeds RLI's expectations in terms of outcomes, and timelines.

If there is a section of the scope that is not available, or the proponent chooses not to address, please clearly identify this in your response.

7.1 Fees

The proposal will include in detail a proposed fee structure table, any optional or additional considerations, and pricing.

- Clearly outline the cost of each major part and key task to complete the project.
- Include all services provided and any excluded services.
- List any potential expenses over and above the proposed budget.
- Lowest proposal will not necessarily be accepted.
- Please identify any discounts, rebates, or other value add beyond price.

7.2 Subcontractors

If the Proponent plans to use subcontractors, the proposal will clearly identify and include the company name of all sub-contractors and sub-consultants that will be used in the performance of the work with a description of the work they will complete.

7.3 Innovation

The proponent is encouraged to include innovative, alternative, or unique solutions to the proposal subject that can indicate cost initiatives, improved environmental impacts, better public relations, and/or project acceptance, reduced risk, improved management, or administrative efficiencies, etc. Any alternative proposals submitted should include the requirements of the original RFP with costs identified for comparative purposes.

8.0 SCOPE OF SERVICES

Objective

The purpose of this RFP is to engage a qualified proponent to design, develop, and implement comprehensive, role-based online staff training modules that strengthen service consistency, compliance, and operational effectiveness across RLI.

SCOPE OF WORK

The successful proponent will design and develop practical, applied training aligned with RLI manuals, policies, and funding agreements.

Training areas include:

- Client Services and Employment Counselling – client assessments, barrier identification, action planning, employment counselling, and pathways to education, training, and employment.
- Case Management and Internal Database Training – accurate data entry, file documentation, client lifecycle management, reporting, and audit readiness.
- Management and Program Administration – program and project management, financial data management, compliance, internal controls, supervision, and quality assurance.

TARGET AUDIENCE

Training must be developed for the following staff groups:

- Advisors – client assessments, action planning, employment counselling, case management.
- Managers – program oversight, project management, financial data management, supervision, and compliance.
- Quality Assurance and Program Assistants – file review, data integrity, reporting, system navigation, and compliance monitoring.

MOODLE-ONLY DELIVERY REQUIREMENTS

All training developed under this RFP must be delivered exclusively through RLI's Moodle learning management system.

Mandatory requirements:

- Training must be fully asynchronous and online.
- No in-person, hybrid, or live virtual delivery is permitted.
- The proponent is responsible for building, uploading, configuring, and testing all courses directly within RLI's Moodle environment.
- The contractor's delivery role is limited to testing and acceptance only. Ongoing training delivery will be managed by RLI after acceptance.

DELIVERABLES

The successful proponent will deliver:

- A detailed training design and work plan.
- Fully developed, modular Moodle courses for all required topic areas.
- Role-specific learning pathways.
- Knowledge checks and assessments.
- Participant resources and reference materials where applicable.
- Courses uploaded, tested, and approved in RLI's Moodle system.

Draft or conceptual materials will not be accepted as final deliverables.

APPENDIX A: REFERENCE FORM

Each proponent is requested to provide a minimum of two references from clients who have obtained similar goods or services from the proponent in the last three years. A minimum of three references relating to relevant project experience must be provided with the details below.

Reference #1

Company Name:	
Company Address:	
Contact Name:	
Contact Telephone Number:	
Date Work Undertaken:	
Nature of Assignment:	

Reference #2

Company Name:	
Company Address:	
Contact Name:	
Contact Telephone Number:	
Date Work Undertaken:	
Nature of Assignment:	