



yukon wildlife preserve

# Request for Proposal

## 10-Year Master Plan (2018- 2028)

Issue date:

March 15, 2017

Closing location:

Yukon Wildlife Preserve Operating Society  
Kilometre 8, Takhini Hot Springs Road  
PO Box 20191  
Whitehorse, Yukon  
Y1A 7A2

Closing date and time:

A Letter of Intent must be received by  
5:00 pm Pacific Time on April 20<sup>th</sup>, 2017

A formal Project Proposal must be received by  
5:00 pm Pacific Time on June 30<sup>th</sup>, 2017

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TWO RESIDENT MOUNTAIN GOATS ENJOYING NATURAL 250 FOOT CLIFF HABITAT

# 1 DESCRIPTION OF PROPOSAL / PURPOSE

This is a Request for Proposal for **consulting services** with respect to the development of a far reaching and all-encompassing **10-year Master Plan**. This plan will guide all aspects of future infrastructure, programming, on-site operations and the development of proactive recommendations to ensure the successful operation of the Yukon Wildlife Preserve (YWP) well into the future.

The Yukon Wildlife Preserve Operating Society has been successful in facilitating and completing most of the recommendations generated in our founding Master Plan (written 2007-2009 and provided with this RFP<sup>1</sup>). We are now looking to engage in the development of a new multi-year Master Plan to carry the Preserve into the future.

The intent of the original Master Plan was to provide guidance to the Friends of the Preserve in moving the concept of developing a wildlife preserve open to the general public – into reality. The original plan did a stellar job at allowing the new public facility to get up and running and has served its purpose very well over the past eight years. This next 10-year Master Plan must lay-out a comprehensive plan for moving forward to ensure that the Preserve has objectively and comprehensively reviewed all facets required to confidently be prepared to address identified future opportunities.

Services are to be provided to the Yukon Wildlife Preserve Operating Society (YWPOS), a registered not-for-profit Canadian charity, and may comprise: project management; regional socio-economic data collection; regional consultation and facilitation with affected stakeholders; design/development of an input/output model (or other agreed to analytical process); and business case development for potential programming, infrastructure and partnership projects to be tested through the aforementioned input/output model (or other agreed to analytical process).

The schedule for this Request for Proposal Competition is as follows:

- ◆ Request for Proposal Released \_\_\_\_\_ 30-March-2017
- ◆ **Letter of Intent** to bid submitted by Proponent \_\_\_\_\_ **20-April-2017**
- ◆ **Project Proposal** Due \_\_\_\_\_ **30-Jun-2017**
- ◆ Selection and Award of Contract \_\_\_\_\_ 31-Jul-2017
- ◆ Project Kick-off Meeting \_\_\_\_\_ September 2017

**Note:** → Only upon receipt of a **Letter of Intent** will a more detailed backgrounder and information package be sent by email directly to the Proponent's attention.

## 1.1 CONTEXT

The national (& international) recognition and engagement with our peers in the zoo and museum community shows that the YWP has a lot to contribute. To represent the Yukon as a leader in our field we need to lay a strong foundation with a compelling, ambitious master plan. Being recognized locally as a treasured institution, and growing from a contributor in the greater zoological community to a leader are goals we wish the deliverables to outline and plan for.

We understand this compelling, ambitious, proactive, comprehensive and forward thinking Master Plan may require substantial resources to complete. At this time we have chosen to not provided a project budget and encourage all Proponents to submit a budget in your Letter of Intent that you are confident will be required to deliver all aspects of the RFP.

A conscientious and diligent approach will be expected to ensure that a final Master Plan does in fact address the specific needs and opportunities of the Yukon Wildlife Preserve; the local, national and international tourism markets and the role the Preserve might play in addressing specific north of 60 / circumpolar research opportunities.

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<sup>1</sup> Please see separate pdf document for the 2009 YWP Master Plan. Only available upon receipt of a Letter of Intent.

## 1.2 OVERARCHING GOALS

- Improve and Grow our Brand:
  - Improve the understanding and reach of YWP’s brand (i.e.; the external manifestation of who we are and what we do/ what our public thinks and feels about us/ our reputation to be) and develop a shared understanding for how we continue to grow and improve our already positive brand.
- To continue to be a valued member of our local community:
  - Better understand what our local community wants the YWP experience to be and align our goals accordingly.
- To increase integration of science and research, and leverage the opportunity to increase our reach and status as a credible center for conservation and education in the Yukon and the circumpolar region:
  - To grow presence in local media (newspapers, radio etc.), with conservation being the ultimate message; and
  - To highlight that animals here at the Preserve are ambassadors for their wild counterparts.
- To become the “Must Visit” destination for all Yukon residents and tourists coming to the Yukon:
  - To see and photograph species (flora and fauna) native to the Yukon in authentic native habitats;
  - To participate in interactive nature exploration and education programs with representatives from YWP; and
  - To see where the Yukon Vet does her work (as seen on the National Geographic Wild Channel).
- To stay financially sustainable over the long-term and to be an economic stimulant for the Yukon economy.

## 1.3 SPECIFIC DELIVERABLES

### 1.3.1 MARKETING AND BRAND DEVELOPMENT RECOMMENDATIONS

That will:

- Confirm the Wildlife Preserves’ BRAND – the lasting impression in the minds of our visitors and partners;
- Ensure every visitor to the Yukon is well aware of the Preserve, its programs and visitation opportunities – both prior to arriving and post arrival to the Yukon; and
- Ensure every Yukon resident is well aware of the Preserve, its programs and visitation opportunities.

### 1.3.2 LONG-TERM LAND-USE PLANNING AND CAPITAL INVESTMENT RECOMMENDATIONS

That will:

- Support the current and future animal collection;
- Improve the overall customer experience and opportunities for animal visitation and educational/interpretive programming; and
- Ensure the long term health and viability of our animal collection.

### 1.3.3 LONG-TERM SUSTAINABLE FINANCIAL PLAN

That will:

- Review and recommend a sustainable, pragmatic and achievable financial/funding model. To include:
  - A review and recommendations of present pricing structure;
  - A review of other Canadian zoological funding models; and
  - Recommendations regarding the development of a public-private partnership.

- Recommend how to best approach and be successful with corporate sponsorships and donations;
- Recommend how to best approach and be successful in the world of philanthropy;
- Recommendations for the society to undertake profitable private/public sector contracts; and
- Recommendations for the society to receive profitable private sector investments which:
  - Adhere to the mandate, mission and goals of the Preserve; and
  - Explore profit making opportunities utilising the approximately 500 acres presently not being utilized (i.e.: “glamping”, trap line experiences, joint venture opportunities, etc.)
- Develop the business cases necessary for any capital investment suggestions and to provide (2) copies of all research and information collected on those projects.

#### **1.3.4 CONFIRMATION OF YWP’S ROLE IN CONSERVATION AND RESEARCH**

That will:

- Establish our conservation goals and the measurement thereof; and
- Establish our role(s) in regard to scientific research.

#### **1.3.5 RECOMMENDATIONS FOR ENHANCED VISITOR EXPERIENCES**

To include recommendations regarding:

- Suggestions for new Visitor Reception and staff offices facility;
- Visitor services (general public) programming;
- Exclusive Experience programming;
- Travel Trade program; and
- Education programming.

### **1.4 CONSULTATION PROCESS**

#### **1.4.1 PROJECT INITIALIZATION MEETING(S)**

- Meet with the Project Steering Committee to confirm all stakeholders and potential partners;
- Work with the project administrator to develop a communication strategy to consult with affected stakeholders and partners;
- Meet with the Project Steering Committee and identify the appropriate analytical process that will most closely meet the objectives of the stakeholders and partners. To include:
  - A description of the various processes considered;
  - A listing of the pros and cons associated with each process; and
  - The rationale behind the process recommended.
- Work with the Project Steering Committee to define the appropriate socio-economic indicators to be incorporated into the chosen analytical process.

#### **1.4.2 PROJECT SCOPING**

The following chart is provided as a starting point for the preliminary scoping of the project, leading to the Master Plan. Proponents will present their own specific planning components and suggested methodology.

## YWP Master Plan: Scoping of Project – Sample Only

Component	Details
Preamble & Gathering of Existing Information	<p>A review &amp; collation of:</p> <ul style="list-style-type: none"> <li>▪ Current Master Plan</li> <li>▪ Mission Statement</li> <li>▪ Mandates</li> <li>▪ Core Values</li> <li>▪ Existing Operating Structure and Partnerships (MOUs, Lease agreement, funding agreements, etc.)</li> <li>▪ Legislative Linkages</li> <li>▪ Description of Intent</li> <li>▪ Review existing mission / vision / values to ensure they are targeted and appropriate to the ultimate messaging of the YWP</li> </ul>
Gap Analysis	<p>Determine what we are missing, if further information gathering is required:</p> <ol style="list-style-type: none"> <li>I. Landscape information</li> <li>II. Biological information</li> <li>III. Financial information</li> <li>IV. Situational analysis</li> </ol>
Consultations	<p><u>Note:</u> All consultation plans by the Proponent must be vetted by the project’s Steering Committee. Some will have to be one-on-one or partner specific while others may include a workshop or charrette using group discussion/decision making using World Café or Institute of Cultural Affairs style group exercises:</p> <p>Invite YWP Partners to review and discuss Goals and long term Opportunities and set priorities for scope of Master Plan and 10 year plan:</p> <ol style="list-style-type: none"> <li>a. Staff</li> <li>b. Present Board</li> <li>c. Past Board</li> <li>d. Visitors</li> <li>e. Community and neighbours</li> <li>f. First Nations</li> <li>g. Other NGOs</li> <li>h. Yukon Research Centre, Yukon College</li> <li>i. Yukon Government (YG)</li> <li>j. Outline and verify with Steering Committee (staff, board, YG) which Sections/Subjects should be included in the Master Plan Report</li> <li>k. Identify additional and potential partner agencies, research collaborators and corporate partners (i.e. National Geographic, Polar Bears International) that may be important in the planning effort</li> <li>l. Identify expertise required (engineering, land-use planning, economic, zoological, marketing, grant writing, etc.) for studies to prepare the Master Plan</li> <li>m. Identify expertise (engineering, land-use planning, economic, zoological, marketing, grant writing, etc.) that may be needed in executing the Master Plan</li> <li>n. Determine probable costs/budgets, schedule and sequencing and potential funding sources for completion of Master Plan recommendations</li> <li>o. Identify ‘Next Steps’ and incremental or step-by-step, phased process to allow for incremental funding of Master Plan subjects/sections</li> </ol>



## YWP Master Plan: Scoping of Project – Sample Only

Component	Details
	<ul style="list-style-type: none"> <li>a. Prioritize subjects/sections (what information/decisions are needed earlier than other information/decisions)</li> <li>b. Collateral materials needs (graphics, data, visitor/community survey, media)</li> </ul>
Prepare Scope and Process Report	<ul style="list-style-type: none"> <li>a. Summary of Intent</li> <li>b. Master Plan Report Sections - Table of Contents                             <ul style="list-style-type: none"> <li>I. Identify who will be responsible for each Section (YWP, Proponent or Partner)</li> </ul> </li> <li>c. Master Plan Study Schedule/Process</li> <li>d. Master Plan Study Budgets</li> <li>e. Incremental (step-by-step) approach with priorities for Subject/Sections</li> </ul>

### 1.5 SCOPING AND PROGRESS DELIVERABLES

To include but not limited to:

- 1) Initial scoping report and proponent proposed work plan, including key project dates for the delivery of project status or component reports;
- 2) Progress reports for each component of the work plan as presented by the Proponent;
- 3) Summary reports for all community, stakeholder and partner consultations \*\*;
- 4) Provide the Steering Committee with two (2) hard copies of the final report (1 bound, 1 unbound) and one (1) electronic copy [Word, Excel or PDF];

\*\* Please note that comprehensive community, stakeholder and partner consultations must be integral components throughout the work plan. Local and regional “buy-in” is mandatory.

#### 1.5.1 SCOPE OF WORK – SAMPLE LISTING ONLY

The Scope of Work includes, but is not limited to:

1. Section 1 Site History
  - 1.1. Mission statement
  - 1.2. Mandates
  - 1.3. Description of intent
2. Section 2 Methods used in process
  - 2.1. Public and community consultations
  - 2.2. Interviews with stakeholders
  - 2.3. Research
3. Section 3 Site Assessment and Analysis
  - 3.1. Inventory of animals
  - 3.2. Land uses (developed vs. undeveloped areas)
  - 3.3. Terrain and ecological features (in and out of property)
  - 3.4. Livestock range and habitat assessment (health, status)
  - 3.5. Indicators of stress
4. Section 4 Program Inventory
  - 4.1. Education
  - 4.2. Research
  - 4.3. Conservation
  - 4.4. Fundraising



4.5. Rehabilitation

4.6. Volunteer

5. Section 5 Animal Collection Plan

5.1. Who stays / who goes / who do we pursue

5.2. Where to they live on the preserve, and why

5.3. What are the species' specific requirements (physiologically, nutritionally, physically)

5.4. Can we meet them? Why? Why not?

5.5. Science-based decision making process

6. Section 6 Future Direction and Goals

6.1. On our collection animals

6.2. On future land development / landscape planning

6.3. Educational programming

6.3.1. Community environmental stewardship

6.3.2. Off-site conservation / education / restoration programs

6.3.3. Landowner workshops

6.3.4. Naturalist workshops

6.3.5. Brochure development

6.3.6. Trail development

6.3.7. Ecosystem themed-approach with signage

6.4. Research

6.4.1. Wildlife cameras

6.4.2. Bioblitz's

6.4.3. Birdbox monitoring programs

6.4.4. Test plots for climate change

6.4.5. Use of drones

6.4.6. Potential of facial recognition

6.4.7. Biomonitoring programs

6.4.8. "centre for research"

6.4.9. Biodiversity monitoring

6.4.10. Invasive species monitoring and management

6.4.11. Collaborators?

▪ UofA

▪ UofC – Master of Planning

▪ Yukon College

▪ UofS

▪ Olds College

▪ CapU

▪ UofT

▪ UofWaterloo

▪ UofGuelph

▪ Royal Roads

▪ UVic

▪ UBC, UBC-O

▪ UNBC

▪ Dalhousie – SRES and School of Planning

▪ Others ...?

6.5. Conservation Initiatives?

6.5.1. Science North

6.5.2. Yukon Conservation Society

6.5.3. CPAWS

6.5.4. Y2Y

6.5.5. Canadian Nature Conservancy

6.5.6. Aboriginal Groups

6.5.7. Territorial Parks

6.5.8. National Parks

6.5.9. CAZA / AZA / WAZA

6.6. Fundraising?

6.6.1. Donation cards

6.6.2. Grant and proposal writing

- 6.6.3. Program promotion
- 6.6.4. Membership Drive
- 6.6.5. Corporate Sponsorship / Philanthropy
- 6.6.6. Delegation and identification of potential projects and funds
- 6.6.7. Wetland Guardians, Frog Watch, Disney Worldwide Conservation Fund, World Wildlife Fund, Loblaw's, Walmart, Shell Environment Fund, Gold Corp, Victoria Gold, CH2MHILL, Yukon Energy, ATCO, Hemmera, EDI, Summit / AE, Capstone, Kaminak, Castle Rock, Skookum, Cobalt Construction, Pelly Construction

6.7. Rehabilitation of orphaned and injured wildlife

6.8. Volunteer programming

6.9. Restoration planning

6.10. Develop a wish list of “needs”, “wants” and “nice to haves”. I.e.:

- 6.10.1. Current: where are we now, what gaps have we identified, etc.
- 6.10.2. Future: where we want to be and by when, and why
- 6.10.3. Rationale: specific and substantiated reasons for each specific goal
- 6.10.4. Funding opportunities: how are we going to achieve each item on the wish list, by when, which funding source, what timelines are on those funding sources, and how frequently would we need to get funding for each item?
- 6.10.5. Time frame: identify specific timeframes to accomplish each goal (i.e. 1-3 yrs., 4-6 yrs. and 7-10 yrs.).

## 1.6 CONSULTING EXPERTISE REQUIRED

- The successful Proponent team must demonstrate the multi-discipline skill sets required to successfully achieve the objectives of this diverse and challenging project;
- The team must consist of the individuals as indicated in the final proposal submitted;
- Team members must have the appropriate level of education;
- Demonstrated expertise in strategic planning;
- Demonstrated expertise in developing and implementing stakeholder consultation processes;
- Demonstrated expertise in tourism product development;
- Relevant references;
- 5 to 10 years' experience doing this type of work OR 5 to 10 years' experience working in Canadian zoological design and management;
- No less than 3 and no more than 10 members on the Proponents project team;
- Preference will be given to those teams that include local (Yukon) resources; and
- The project administrator must be notified of any significant change in the make-up of the consulting team after they have been contracted for this project.

## 1.7 CONTENT OF PROPOSAL

The proposal should consist of:

- A comprehensive project management plan, including details of the methodologies to be utilized and a complete summary of the expected results including timeline showing time required for individual tasks and description of key milestones;
- An overview detailing activities, time-line requirements, fee structures, and method of billing; including the labour, equipment, tools, permits, fees, disbursements, supervision, and other requirements necessary to complete the Plan. Any omissions in the proposal shall not relieve the Proponent from the responsibility of completing them; and
- Proponents shall provide a summary of their proposed team, including a breakdown of duties and responsibilities throughout the Project. Resumes outlining relevant experience and references are required for all team members.

## 1.8 PROPONENT GENERAL TERMS AND CONDITIONS

- The Yukon Wildlife Preserve Operating Society reserves the right to reject all Proposals or to award the contract to other than the lowest Proponent bid, following a full value analysis, if it perceives this to be in its best interest;
- This proposal is to be submitted without any knowledge, comparison of figures, or arrangement with any other person making a bid or estimate for the same purpose, and it is in all respects fair and without collusion or fraud; and If only one Proposal is received, the Yukon Wildlife Preserve Operating Society may accept or reject that Proposal; and
- The Yukon Wildlife Preserve Operating Society may select or negotiate the contract award with the Proponent on the basis of policies and preferences not stated in the Proposal package;

## 1.9 ACCEPTANCE AND AWARD

- An acceptance mailed to the successful Proponent, within the time for acceptance as specified in the Request for Proposal documents, results in a binding contract, without further action by either party.
- Proposals will be fully evaluated and the contract will be awarded utilizing the following criteria:

<b>Proponent Qualifications, Expertise and Experience → see Section 1.6</b>	<b>60%</b>
<ul style="list-style-type: none"> <li>▪ Demonstrated experience conducting diverse business development strategies</li> </ul>	15%
<ul style="list-style-type: none"> <li>▪ Demonstrated experience in land-use planning for both animal collection management and visitor access/flow</li> </ul>	15%
<ul style="list-style-type: none"> <li>▪ Demonstrated experience in implementing successful and inclusive community consultation processes</li> </ul>	10%
<ul style="list-style-type: none"> <li>▪ Quality of previous work completed</li> </ul>	10%
<ul style="list-style-type: none"> <li>▪ Familiarity with the local, First Nation, Federal and Territorial political systems &amp; structures, and economic issues and opportunities within the region</li> </ul>	10%
<b>Methodology</b>	<b>40%</b>
<ul style="list-style-type: none"> <li>▪ Detail and clarity of proposal</li> </ul>	5%
<ul style="list-style-type: none"> <li>▪ Project management plan showing breakdown of tasks and personnel (or subcontractor) assignments, including contractor and staff time commitment to tasks identified</li> </ul>	10%
<ul style="list-style-type: none"> <li>▪ Project timeline including time required for individual tasks and description of key milestones</li> </ul>	5%
<ul style="list-style-type: none"> <li>▪ Demonstrated cost-effective and efficient approach to project completion</li> </ul>	10%
<ul style="list-style-type: none"> <li>▪ Understanding of project based on RFP requirements</li> </ul>	5%
<ul style="list-style-type: none"> <li>▪ Cost effectiveness. Considered best market value</li> </ul>	5%

### 1.9.1 SIGNATURES

The Proponent will confirm his/her interest in writing on:

1. The “Letter of Intent” Form (see Annex A1); and
2. The “Request for Proposal” Form (see Annex A2).

On both forms, the Proponent will provide documentation of the name of the company, place of business, and person(s) authorized to sign the letter and proposal on behalf of the company.

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### 1.9.2 BIDS

- A **LETTER OF INTENT** (to bid) must be submitted by email within 3 weeks of the Tender Package being distributed (April 20<sup>th</sup>, 2017). Emailed Letters of Intent are acceptable only if proof is provided that a hard copy is on route by courier (i.e.: scan of courier documents).
- A **PROJECT PROPOSAL** (bid) must be submitted by June 30<sup>th</sup>, 2017. The tender package should contain two (2) hard copies of the submission (1 bound, 1 unbound) and one (1) electronic copy [Word, Excel or PDF];
- All prices quoted are to be in Canadian currency and notations must be typewritten or written in ink. Mistakes must be crossed out and corrections typewritten or written in ink adjacent thereto, and initialed in ink by the proper signing officer of the Proponent.
- No Proposal or modification thereof, received after the Tender Closing date and time will be considered.
- In case of mistakes in the extension of prices, unit prices will govern.
- Three (3) hard copy original proposal packages are required (2 bound, 1 unbound).
- Proposals are to be provided by email provided a copy of the courier receipt is included in the email.
- Proposals and modifications thereof shall be enclosed in sealed, return addressed envelopes. Envelopes shall be addressed to the:

Yukon Wildlife Preserve Operating Society  
PO Box 20191  
Whitehorse, Yukon  
Y1A 7A2  
Canada

PLEASE LABEL “YWPOS Bid Package”

PLEASE EXPEDITE BY COURIER

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### 1.9.3 PROPONENT CONTRACTOR’S LIABILITY

- The contractor shall indemnify and save harmless the Yukon Wildlife Preserve Operating Society and all officers, servants, and agents from and against all claims relating to labour and material furnished for the work in connection with this contract and to inventions, copyrights, trademarks or patents and patent rights used or infringed by the contractor in the manufacture or supply of the supplies furnished thereunder, and from all such claims in the subsequent use and operation thereof after delivery to the Yukon Wildlife Preserve Operating Society.

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### 1.9.4 LIENS

- The Contractor, his surety and their respective heirs, executors, administrators, successors and permitted assigns shall fully indemnify the Yukon Wildlife Preserve Operating Society and all officers, servants and employees from and against any and all liability or expenses by way of legal costs or otherwise in respect to any claim which may be made for a lien or charge against at law or in equity or to any claim or liability or to any attachment for debt, garnishee process or otherwise.

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### 1.9.5 CONFIDENTIALITY

- The successful Proponent agrees to hold in confidence any and all information, know-how, data, and strategy including information on future Yukon Wildlife Preserve Operating Society, management and governance disclosed to the Proponents either directly or indirectly, in connection with the design, implementation, and/or operation of the

Yukon Wildlife Preserve Operating Society provided, however that Proponent's obligation to keep in confidence shall not apply to:

- ◆ Information which, at the time of the disclosure, is in the public domain;
  - ◆ Information which, after disclosure, becomes part of the public domain, by publication or otherwise, other than by the Proponent;
  - ◆ Information which Proponent can show was in the Proponent's possession at the time of the disclosure and was not acquired directly or indirectly from the Yukon Wildlife Preserve Operating Society; and
  - ◆ Information which has been or later furnished or made known to the Proponent by third parties as a matter of right and without restriction on disclosure.
- All documentation, reports, proposals will at times remain the property of the Yukon Wildlife Preserve Operating Society. Such documentation, reports, proposals furnished to the Proponent by the Yukon Wildlife Preserve Operating Society are loaned to the Proponent only for the Proponent's use relating to this project. Proponent's shall not reproduce, copy, publish or permit reproduction, copying or publication of such data furnished by the Proponent or any part thereof without the prior written permission of the Yukon Wildlife Preserve Operating Society. For the purposes of undertaking this proposal, the Proponent shall have the right to disclose information to third parties performing work or services for this project, but only after the Proponent secures confidentiality undertakings from all such third parties.

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#### 1.9.6 PERFORMANCE

- The successful Proponent must maintain close communication with the Yukon Wildlife Preserve Operating Society with contacts being identified through the Yukon Wildlife Preserve Operating Society.
- The project undertaken is to be structured in such a manner that progress reports are provided as indicated in the "tasks", "deliverables" and "schedule of project" sections of the proposal.
- Upon agreement, the Yukon Wildlife Preserve Operating Society and the Proponent may terminate this project at any point in time. YWPOS agrees to pay for work completed to the specified point in time.

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#### 1.9.7 NOTICES

- Any notice required to be given in this contract shall be deemed to be duly given to the Yukon Wildlife Preserve Operating Society if sent by registered mail addressed to the Yukon Wildlife Preserve Operating Society –PO Box 20191, Whitehorse, Yukon Y1A 7A2 and to the Proponent if sent by registered mail.

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#### 1.9.8 DEFINITIONS

- The words "Yukon Wildlife Preserve Operating Society" means the person for the time filling the office of Executive Director, or the person acting as such on behalf of the YWPOS Board of Directors.
- The word "contract" means formal agreement between the Yukon Wildlife Preserve Operating Society (on behalf of its Board of Directors) and the successful Proponent and includes the Request for Proposal, the schedules, the general conditions, the specifications, the drawings, bid, award, and all other documents referred to in these general conditions, or attached hereto.
- The word "Proponent" or a pronoun in place thereof, means the person(s) or firm(s) submitting a proposal for this project.

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#### 1.9.9 SCHEDULE OF PROJECT

- The Yukon Wildlife Preserve Operating Society – Board of Directors have agreed to hire a Proponent to undertake the consulting services as outlined in this Request for Proposals.
- The schedule for this Closed Request for Proposal Competition is as follows:
- ◆ Request for Proposal Released \_\_\_\_\_ 30-March-2017

- ◆ **Letter of Intent** to bid submitted by Proponent \_\_\_\_\_ **20-April-2017**
- ◆ **Project Proposal** Due \_\_\_\_\_ **30-June-2017**
- ◆ Selection and Award of Contract \_\_\_\_\_ 31-Jul-2017
- ◆ Project Kick-off Meeting \_\_\_\_\_ September 2017

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#### 1.9.10 CLOSING TIME

**5:00pm (PST) – June 30, 2017**

- ◆ **Letters of Intent** can be emailed in Word or pdf format;
- ◆ **Project Proposal** should be delivered by courier and tracked. It is the sole responsibility of the Proponent to ensure delivery of the tender package before the official Closing Time;
- ◆ The tender package should contain two (2) hard copies of the submission and one (1) electronic copy [Word, Excel or PDF];
- ◆ Proposals received after the noted due time will not be considered and will be returned unopened;
- ◆ Proposals must be submitted on the Proposal form (Annex A2);
- ◆ A complete and detailed covering letter must be attached to the Proposal form;
- ◆ Responses to this Request for Proposal by fax WILL NOT be accepted; and
- ◆ Proposals will be opened at 9AM, Monday, July 3, 2017.

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#### 1.9.11 WITHDRAWAL

- Proposals may be withdrawn by written notice ONLY, provided such notice is received and acknowledged by the Yukon Wildlife Preserve Operating Society prior to the Tender Closing time.

## 2 THE MASTER PLAN PROJECT – BACKGROUNDER

The Yukon Wildlife Preserve Operating Society (YWPOS) has diligently facilitated and completed most of the recommendations within its founding Master Plan<sup>2</sup> (written 2007-2009). Now, it is time to develop a new, comprehensive Master Plan to direct the Preserve's future course. YWPOS envisions a different direction and exciting future. Our new Master Plan needs to guide YWP's growth from a local tourism operator to treasured Yukon institution – from a contributor in our field to a leader in our field.

The national (& international) recognition and engagement with our peers in the zoo and museum community shows that the YWP has a lot to contribute; to represent the Yukon as a leader in our field we need to lay a strong foundation with a compelling, ambitious master plan. This is a master plan that will help the Preserve be recognized locally as a treasured institution. Growing from a contributor in the greater zoological community to a leader are goals we wish the deliverables to outline and plan for.”

We understand this compelling, ambitious, proactive, comprehensive and forward thinking Master Plan will cost substantial resources (\$100K+). This is not something to rush into without performing due diligence required. Any resulting Master Plan must address the specific needs and opportunities of the Yukon Wildlife Preserve, the local, national and international tourism markets, as well as the role YWP might play in addressing northern research challenges and opportunities.

### 2.1 VISION, MISSION AND CORE VALUE STATEMENTS

Vision: The Yukon Wildlife Preserve will be informed voices that speak for the natural world.

Mission: To connect our visitors to the natural world by being a living centre of Yukon's species.

Core Values:

- ◆ Relentlessly pursue the highest standard of animal care;
- ◆ Be accessible to all visitors;
- ◆ Model respect and teamwork with coworkers, volunteers, and our community; and
- ◆ Treasure the Yukon's natural world.

### 2.2 KEY BENEFITS

The key benefits of a Master Plan to YWPOS, the community and the Territory include:

- Economic benefit of an enhanced YWP through increased tourism and recreation, particularly in the Takhini Corridor;
- Potential for YWP to evolve into a destination for tourism (not just a side trip);
- Social and health benefits of safe, accessible and engaging outdoor recreation:
  - The YWP draws people into the outdoors in a natural setting without the risks of back-country off-grid recreation;
  - The YWP can grow as a place where kids can play in natural settings without risk of negative encounters with wildlife.
- Increased national recognition of the YWP, and more generally, Yukon and Yukoners as leaders and innovators – at the cutting edge of what zoological institutions SHOULD be striving for;
- Critical for the future growth of the YWP to provide clear path into the future for all stakeholders and governments;
- Must address long-term sustainability or we run the risk of losing this unique community asset – to the disenchantment of local residents and visitors alike – perhaps most especially, school children;
- Better define the mandate and the goals of the YWP;

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<sup>2</sup> Please see separate pdf document for the 2009 YWP Master Plan.



- Increased public awareness and involvement in the future of a public resource;
- Greater awareness in northern conservation, particularly in the face of climate change;
- Climate change is slated to impact the northern areas more significantly than in the southern regions;
- Many Yukon species are uniquely adapted to the ecosystems and the climate of northern regions, and are not as adaptable, prone to extinction;
- Changing political climate means that we as a public resource, have the responsibility to keep objective and focused on science & conservation, and remain ambassadors of the environment;
- Unfocused path towards research and conservation presently, and in order to achieve our mission and mandate, and to continue to uphold our CAZA accreditation, we need to define these things better and in a more consolidated fashion;
- There is real potential for the Preserve to grow into a “destination attraction”. An enhanced Preserve combined with the national and international awareness generated via a number of TV shows could easily result on people deciding to visit the Yukon “because” of its Wildlife Preserve;
- Professional colleagues from Canada and internationally always expound to YWPOS that what we have at the Preserve is very much world-class and “... cannot be replicated anywhere else in the world”! We are being encouraged by the whole zoo and scientific community to think outside the box and creatively build/develop a product/experience that truly stands-out from anything else; and
- The successful development of this world-class facility could greatly assist keeping “Yukon” front of mind for both global tourists and the circumpolar research sector.

### 2.3 THE CHALLENGE & OPPORTUNITY

YWP is presently facing a number of challenges (see 2.5) that must be addressed in order to:

1. Develop growth strategies, evaluate opportunities for growth, understand market forces and review comparable facilities and economic trends that might inform a growth strategy.
2. In the short-run, the YWPOS needs to grow in order to increase the margin between revenue and cost. In the long-run, the YWPOS needs growth to further increase that margin and to create a physical infrastructure that can springboard the organization to enhanced mission performance.
3. Potential development scenarios must improve the YWPOS financial health; social and political noteworthiness, quality of research and improved opportunities for the interpretation and display of circumpolar flora and fauna.
4. Ensure the facility can be operated in a financially sustainable manner.
5. Maximizes the vast potential that this very unique facility has to impact both the national and potentially global zoological industry. Including effective animal husbandry, research (i.e.: climate change), conservation, education and rehabilitation – all based on all natural animal habitats that are literally setting the standard for new zoological facilities and which existing facilities are trying hard to emulate.

### 2.4 THE GOOD NEWS

- Visitation from both local Yukon residents and national & international markets has more than doubled since the opening of the Wildlife Preserve – much of this growth in the past 5 years.
  - The ratio of local Yukon visitors has been climbing consistently over the past number of years – demonstrating the ongoing, and increasing, support from Yukoners.
  - In-bound tourism wholesalers (i.e.: Northern Tales) are building a tour of the YWP into their international tourism catalogues and our travel trade visitation numbers continuing to grow.
- Revenue generated in-house by YWPOS programming (school programs, Nature Camp, birthday parties, special Exclusive Experiences, retail sales and gate admissions) has grown substantially ever since the gates opened to the public eleven years ago (i.e.: up 114% in past 5 years).
- Local awareness has been greatly enhanced and can be witnessed by the outstanding caliber of local individuals who

have stepped forward to serve on the YWPOS Board of Directors. Whether they are the founding members or our present 2016-2017 Board members – all are bastions of the Yukon community who are eager to bring their expertise, experience and contacts to the table in a personal effort to “... assist in any way they can”.

- National awareness, both in the general public and the professional zoological sector, has increased immensely over the past five years. In the national zoo setting, the YWP has become a leader. While small in size, our approach and facility is, in some ways, years ahead of many Canadian institutions:
  - Achieving ‘unconditional’ accreditation with Canada’s Accredited Zoos and Aquariums (CAZA) has catapulted the Wildlife Preserve into the forefront of our national zoological sector. As mentioned earlier, the Preserve is the envy of the majority of other accredited Canadian facilities. This has also not gone unnoticed by the much larger American Zoo Association (AZA) and the World Zoo Association (WZA).
  - In 2014, the YWPOS Executive Director, Greg Meredith, was elected to the Board of Directors for Canada’s Accredited Zoos and Aquariums and presently sits on the Membership and Ethics committees.
  - Director of Programming and Education, Jake Paleczny was recently sought out by the Canadian Museum of History to sit on the Virtual Museum of Canada Advisory board as a representative of the northwest and to represent a progressive leader in the zoo and wildlife world.
- International awareness of the Yukon Wildlife Preserve has been nothing less than astonishing with the National Geographic Wild production of Dr. Oakley, Yukon Vet – a show now in its fourth season and seen in 133 countries and ranked as the second most popular show NatGeo Wild has ever produced. This show, along with being featured in “Canada Over The Edge” has provided millions of dollars in international awareness.
- While any research utilizing the Preserve is limited, awareness in the research sector is enhanced through the Preserve’s membership in the Canadian Network of Northern Research Operators (<http://new.cnnro.org/yukon-wildlife-preserve/>). In addition, and as mentioned previously, the Preserve has been host to a myriad of university research programs over the years. We would like to greatly expand these collaborations and foresee an expanded research component as an important revenue generator in the future.

## 2.5 IMMEDIATE CONCERNS

While the Wildlife Preserve should be considered an outstanding success to-date, the Preserve suffers from a reality that it has no control of – a very limited local market and limited tourism visitors to the Yukon.

Associated challenges include:

- Revenue generation may soon plateau & expenses will continue to climb:
  - In 2015-2016 we will realize 25,000+ visitations (50% local/50% tourists) – up 94% from 5 years ago. This is a huge increase but with a Yukon population of 37,000 and a Whitehorse population of around 27,000, and limited visitors to the Yukon – we fear that our visitation numbers are slowly reaching a saturation point where it will become increasingly more difficult and expensive to attract additional numbers → unless we can provide enhanced, world-class product offerings.
  - Retail sales have also been increasing but with a 300 sq. ft. total footprint for providing both visitor services and retail – we are extremely limited in the variety and amount of retail products we can sell. We think that if we had three times the space, we would sell three times the retail → emphasizing the need for a larger, professional, attractive and functional Reception/Interpretive/Retail facility.
  - While our membership is strong (~1,400) we intentionally charge a minimum rate for annual memberships. It has been suggested that we should raise our membership rates but it is felt that, while we might generate marginally more membership revenues, we risk upsetting existing members and perhaps losing some – making this option not desirable.
- Underutilized land base:
  - The total Preserve consists of about 750 acres. Presently we utilize only 230 acres. We need to thoroughly explore what revenue generating opportunities we might be able to implement by developing (naturally) the remaining 470 acres.
- Generating revenues through research:

- While there have been a number of research projects undertaken over the years from a variety of higher level learning institutions, the revenues generated through this approach are very minimal – say less than \$2,000 in the past 5 years. We need to look at other models where research generates substantial revenue.
- The lack of a YWP Foundation:
  - Presently there is no fundraising arm of the YWP Operating Society – be it an in-house fundraising program &/or an arm’s-length Foundation charged with soliciting funds for the society. Again, we need to explore how we might initiate a foundation or other such source of successful fundraising.
  - Tied to this is the lack of a corporate fundraising strategy (nor capacity at present).

### 3 ANNEXES:

On the following pages, are the following Annexes are attached:

- A. Proposal Cover Page – for submission purposes;
- B. Property Sketch and Aerial Maps; and
- C. 2018 – 2028 YWP Master Plan – DRAFT/ENVISIONED Table of Contents.

Additional supporting documents will only be provided upon receipt of a Letter of Intent (due April 20<sup>th</sup>, 2017):

- D. YWP Backgrounder – separate pdf file;
- E. 2016-2017 Institutional Collection Plan – a separate pdf file; and
- F. Master Plan 2007 – Yukon Wildlife Preserve (Revised April 29, 2009) – separate pdf file.

## LETTER OF INTENT

Proponents must indicate their intention to submit a project proposal by providing a Letter of Intent.

Letters of Intent up to two pages long should outline: (i) proponent background and qualifications; (ii) project objectives and activities, including an approach to comprehensive public consultation ; (iii) relevance to the project's overall intent and goals; (iv) planned & suggested deliverables; and (v) a preliminary budget summary (not binding).

In recognition of the unique outcomes desired in the resulting Master Plan, appreciation will be given to Letters of Intent which clearly demonstrate a multi-faceted, diversified consulting team approach.

Any project proposals received without an affiliated letter of intent will not be accepted and will be returned unopened to the Proponent.

## INTENTION TO SUBMIT A CONSULTING SERVICES BID TO THE YUKON WILDLIFE PRESERVE OPERATING SOCIETY

DATE OF LETTER: \_\_\_\_\_

The undersigned offers this Letter of Intent to submit a consulting services bid in response to a Request for Proposals regarding the development of a 10-year Master Plan for the Yukon Wildlife Preserve Operating Society.

COMPANY: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_

PROVINCE/STATE: \_\_\_\_\_

POSTAL CODE/ZIP: \_\_\_\_\_

PHONE: \_\_\_\_\_

FAX: \_\_\_\_\_

NAME: \_\_\_\_\_

TITLE: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

WITNESS: \_\_\_\_\_

The Proponent is a company incorporated under the law of: \_\_\_\_\_

## REQUEST FOR PROPOSAL

Until the time designated in the attached schedule as the “Closing Time”, the Yukon Wildlife Preserve Operating Society (at times, hereafter referred to as “YWPOS”) will accept Proposals for supplying to the YWPOS, the supplies or services described in the schedules attached hereto at the point or points designated therein.

### 10-YEAR MASTER PLAN YUKON WILDLIFE PRESERVE OPERATING SOCIETY

DATE OF PROPOSAL: \_\_\_\_\_

In compliance with the above Request for Proposal, the undersigned offers and agrees if this Proposal is accepted within 21 calendar days from the date of opening, to furnish or supply to the Yukon Wildlife Preserve Operating Society or its designated agent(s), all or any part of the items upon which the prices are stated, at the set price opposite each item, delivered to the designated point or points within the time specified in the schedule attached hereto.

COMPANY: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_

PROVINCE/STATE: \_\_\_\_\_

POSTAL CODE/ZIP: \_\_\_\_\_

PHONE: \_\_\_\_\_

FAX: \_\_\_\_\_

NAME: \_\_\_\_\_

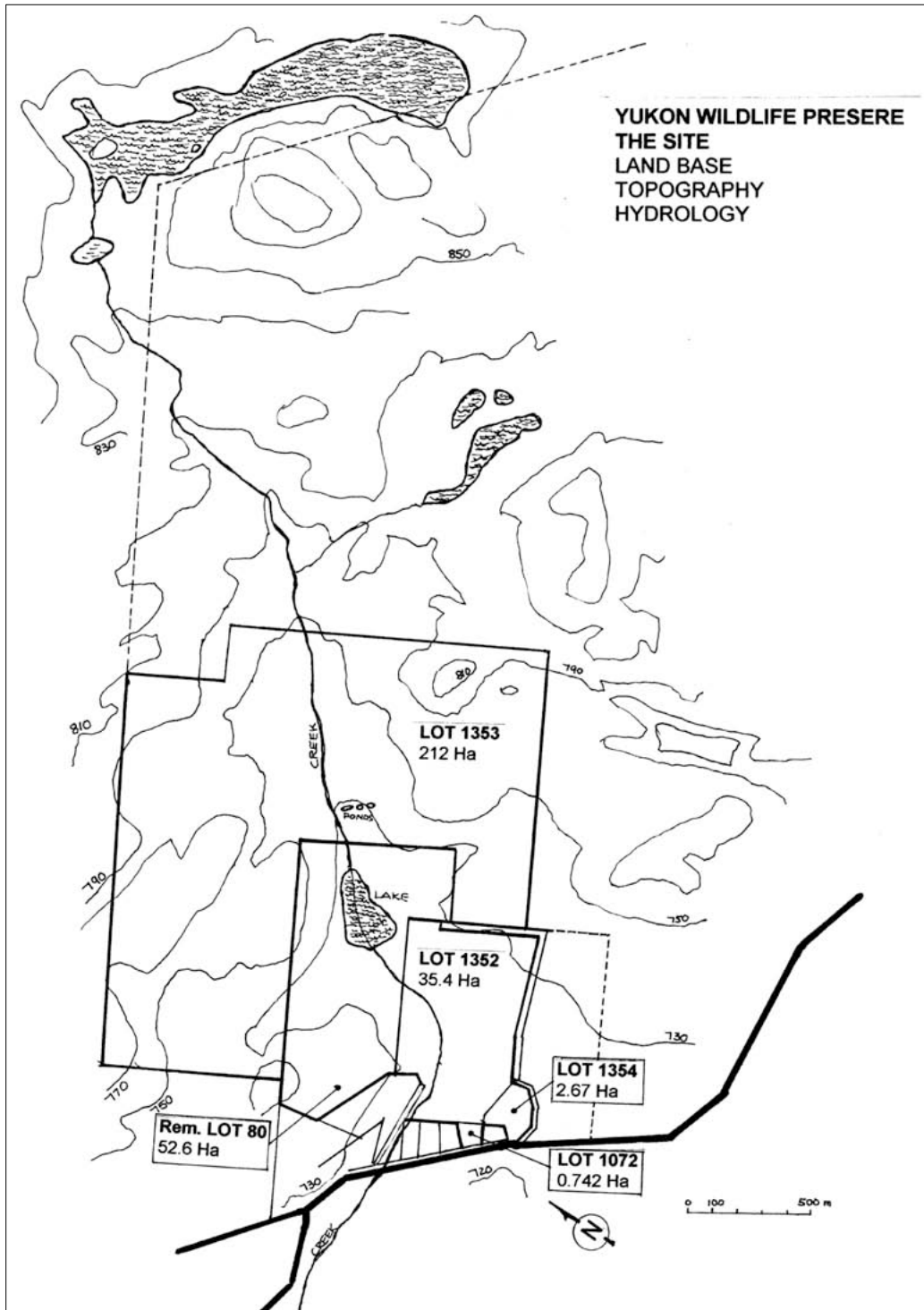
TITLE: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

WITNESS: \_\_\_\_\_

The Proponent is a company incorporated under the law of: \_\_\_\_\_

### 3.3 ANNEX B: PROPERTY SKETCH & AERIAL MAP











## 3.4 ANNEX C: 2018-2028 YWP MASTER PLAN – SAMPLE TABLE OF CONTENTS

2018 - 2028 MASTER PLAN – Yukon Wildlife Preserve

FOREWORD: Minister of Environment, President of Society

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### TABLE of CONTENTS:

#### Executive Summary

1. Background
  - 1.1. History of the Yukon Wildlife Preserve
  - 1.2. Community and Culture
  - 1.3. Legislation
  - 1.4. Administration and Staffing
  - 1.5. Visitors
2. The Existing Yukon Wildlife Preserve
  - 2.1. Access
  - 2.2. Existing Facility
  - 2.3. Topography
  - 2.4. Ecology and Climate
  - 2.5. Hydrology
  - 2.6. Roadways and Trails
  - 2.7. Visitors
  - 2.8. Animal Inventory
  - 2.9. Administration and Staffing
  - 2.10. Economic History and Assets
3. The Yukon Wildlife Preserve: Operational and Management Principles
  - 3.1. Governance and Mission Statement
  - 3.2. Vision and Mission Statements
  - 3.3. Service to Community
  - 3.4. Public Input
4. The Operational Mandate
  - 4.1. Visitor Services and Facilities
  - 4.2. The Yukon Wildlife Preserve's Environment
  - 4.3. Animal Population
  - 4.4. Animal Health Care Program
  - 4.5. Animal Rescue and Rehabilitation
  - 4.6. Education
  - 4.7. Research
  - 4.8. Conservation
  - 4.9. Public Relations and Marketing
  - 4.10. Funding and Budgeting
  - 4.11. Operating Society Values
5. Operating Programs
  - 5.1. Facilities and Visitor Services
  - 5.2. Administration
  - 5.3. Education Services
  - 5.4. Exhibit Organization
  - 5.5. Viewing Experiences
  - 5.6. Animal Management
  - 5.7. Health and Quarantine
  - 5.8. Facility Maintenance
  - 5.9. Wildlife Rehabilitation
  - 5.10. Research

6. Capital Development
  - 6.1. Education/Interpretive Centre/Administration Complex
  - 6.2. Animal Clinic/Quarantine/Rehabilitation/Research Building
  - 6.3. Additional Capital Projects
  - 6.4. Capital Program Projects Timelines
  - 6.5. Capital Project

## Supporting Information Package:

Pursuant to receiving a Letter of Intent, the following supporting documents will be forwarded to the Proponent's attention:

3.5 ANNEX D: YWP BACKGROUNDER – A SEPARATE PDF FILE

3.6 ANNEX E: INSTITUTIONAL COLLECTION PLAN – A SEPARATE PDF FILE.

3.7 ANNEX F: MASTER PLAN 2007 – YUKON WILDLIFE PRESERVE (REVISED APRIL 29, 2009) – A SEPARATE PDF FILE