REQUEST FOR PROPOSAL

The Peguis Surrender Claim Trust represents one of the largest settlements of its kind in the history of Canada. Established in 2010 to receive, invest, manage, and administer the assets of the Trust for the benefit of the beneficiaries, Peguis First Nation, and its members.

Peguis Surrender Claim Trust is currently accepting proposals for a consultant to assist in a 1-day Strategic Planning Session on November 13, 2026 at South Beach Casino & Resort, 1 Ocean Dr, Scanterbury, MB.

Scope of Work:

The Consultant will support the Surrender Claim Trust in reviewing its strategic direction, assessing progress to date, and establishing clear priorities and measurable objectives for 2027.

The scope of work will include:

1. **Review of Previous Strategic Planning Reports**
   Review past strategic plans, reports, annual workplans, and other relevant organizational documents to identify previous priorities, commitments, accomplishments, outstanding initiatives, and areas requiring continued attention.

2. **Current State and Progress Assessment**
   Assess the Trust's current state and progress against existing strategic priorities and workplans, identifying key accomplishments, outstanding actions, emerging needs, challenges, and opportunities.

3. **Facilitation of Strategic Planning Session**
   Plan and facilitate an engaging strategic planning session with Trustees, management, and other identified participants to review progress, confirm organizational direction, and establish priorities for 2027.

4. **Strategic Priorities**
   Facilitate the identification and development of clear strategic priorities that reflect the Trust's mandate, long-term vision, current operating environment, and needs of the organization and its beneficiaries.

5. **SWOT Analysis**
   Review and update the existing Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis to reflect the Trust's current internal and external environment.

6. **Risk Analysis**
   Identify and assess key strategic, governance, financial, operational, reputational, and other organizational risks that may affect the Trust's ability to achieve its strategic objectives. Where appropriate, identify potential mitigation strategies.

7. **Short- and Long-Term Goals**
   Develop clearly defined short-term and long-term goals aligned with the Trust's strategic priorities and mandate.

8. **SMART Objectives and Action Plan**
   Develop Specific, Measurable, Achievable, Relevant and Time-Bound (SMART) objectives for each strategic priority, supported by an action plan identifying key activities, responsibilities, timelines, expected outcomes, and measures of success.

9. **2027 Strategic Workplan**
   Develop a practical 2027 workplan that translates the strategic priorities into actionable initiatives and identifies:
   - Strategic priority and objective;
   - Key activities and deliverables;
   - Responsibility/lead;
   - Target timelines and milestones;
   - Performance indicators and expected outcomes;
   - Status/progress measures; and
   - Key risks or dependencies.

10. **2027 Strategic Planning Report**
    Prepare a comprehensive final Strategic Planning Report incorporating the results of the planning process, including the current-state assessment, progress to date, updated SWOT analysis, risk analysis, strategic priorities, short- and long-term goals, SMART objectives, action plan, and 2027 workplan.

The final report and workplan should provide the Trustees and management with a practical framework for implementing, monitoring, and reporting on the Trust's strategic priorities throughout 2027.

Tasks and Timelines:

Timeline	Task
October 9th, 2026	Deadline for submissions
October 19th, 2026	Proposal Evaluation Completed
October 23rd, 2026	Successful consultant selected
November 27th, 2026	Complete Strategic Plan Report

1. A proposal describing your qualifications and how the tasks described above would be carried out.
2. A firm estimate of fees to be charged, and an estimate of expenses that would be incurred.
3. Resume
4. Portfolio of previous work

How to submit a proposal:

Interested consultants should submit the following, **no later than October 9th, 2026**, to

Contact: Debbie McElhinney, Trust Manager
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