

**REQUEST FOR PROPOSAL –
INDIGENOUS FINANCIAL LITERACY INITIATIVE:
SCALING, STRENGTHENING, AND SUPPORTING THE
SUCCESS OF INDIGENOUS ENTREPRENEURS
RFP# 1 RSRCH - 2024 – 01 NATIONAL SURVEY SUPPORT**

This Request for Proposal seeks to establish a successful contractor to assist the Research Department at Canadian Council for Indigenous Business (CCIB) with planning, executing, and analyzing a national survey of Indigenous entrepreneurs.

The complete bid submission must be submitted by 12 P.M. Eastern Standard Time (EST) on August 26, 2024. Submissions received after this date will not be accepted.

Complete bid submissions can be submitted via email with the subject line titled RFP # 1 RSRCH – 2024 – 01 to the email address below:

Research

research@ccib.ca

Canadian Council for Indigenous Business will not necessarily accept the lowest proposal received and it reserves the right to accept or reject any or all proposals submitted. Actual contract pricing will be subject to reaching agreeable terms and conditions with the successful proponent. Priority selection will also be given to Indigenous applicants.

RFP#1 RSRCH - 2024 - 01 National Survey Support



CONTENTS

1. Contact Information and Timelines.....	3
2. Definitions.....	4
3. CCIB Background & Context.....	4
4. Scope of Services Required.....	6
5. Specifications.....	7
6. Submission Requirements.....	10
7. Evaluation and Award Process.....	11
8. Receipt of Proposals.....	11
9. Contact Person for Successful Bidder.....	11
10. Terms & Conditions.....	11
Appendix A – Submission Form.....	13
Appendix B – Project plan & budget.....	15
Appendix C - CCIB Participation Points.....	16



1. Contact Information and Timelines

Contact Information:

Proposals will be accepted until 12 P.M. EST, August 26, 2024. Proposals must be signed, submitted and addressed:

Re: RFP #1 RSRCH - 2024 – 01 National Survey Support

Your Name:

Your Title:

Company:

Phone:

Email:

Mailing Address:

RFP Timelines:

Item	Date
RFP distribution to bidders	July 24, 2024
Questions for RFP addendum period	August 5, 2024
RFP reposting with addendum (if necessary)	August 9, 2024
Submission deadline	August 26, 2024
Final bidder selection	September 6, 2024
Announcement of successful bidder(s)	September 9, 2024

Project Phase Timelines:

Phase #	Phase name	Completion date
---------	------------	-----------------

1	Questionnaire design support	October 16, 2024
2	Execution of national survey	November 15, 2024
3	Data analysis & preparation of national survey stub and banner tables	January 30, 2025

2. Definitions

Bidder – any individual, company or organization that has submitted a bid to CCIB pertinent to this RFP.

Successful Bidder – the individual, company or organization as decided by CCIB, who is contracted to execute the work as detailed in the bid.

Contractor – interchangeable with successful bidder.

3. CCIB Background & Context

CCIB is a national member-based organization. Our membership includes Indigenous businesses, community-owned economic development corporations, and companies operating in Canada. We are governed by a voluntary Board of Directors that are representative of our membership as patrons, Indigenous business members, and senior industry leaders. The staff is a team of dynamic professionals dedicated to economic reconciliation and growing the Indigenous economy for the benefit of all Canadians. CCIB is a non-partisan/non-profit organization with a mission to promote, strengthen and enhance a prosperous Indigenous economy through the fostering of business relationships, opportunities, and awareness. We are supported through corporate funding, event sponsorship, and membership dues. For more information, visit: <https://www.ccib.ca/>



Overview of the size and scope of CCIB

CCIB is an Indigenous-led organization with over 2,600 members, over 60 per cent of which are Indigenous-led firms. CCIB's research department also owns and stewards one of the largest databases of Indigenous businesses in Canada with over 10,000 firms in total.

An applicant may request to use this national Indigenous business directory housed by CCIB if the applicant does not currently have an updated national Indigenous business directory housed internally. The use of CCIB's Indigenous business list is not required in circumstances where the applicant can demonstrate the rationale and methodology for the use of their own national database of Indigenous businesses.

What service are we looking for from the successful bidder?

- Support with national survey questionnaire design
- Execution of a national survey that through its response rate provides an adequate representation of the Indigenous business community and is compatible with CCIB's prior surveys
- Cleaned and weighted, where necessary, stub and banner tables associated with the findings of the national survey

Project objective

This RFP is intended to solicit assistance and support related to one of our ongoing projects, the *Indigenous Financial Literacy Initiative: Scaling, Strengthening, and Supporting the Success of Indigenous Entrepreneurs*. This multi-year project aims to gather the most current data on the relationship between financial literacy and Indigenous business success in Canada and use this data to help design and deliver financial literacy-related support to Indigenous entrepreneurs. Indigenous Peoples, communities, and businesses work from a disadvantage in the Canadian economy. Due to systemic barriers, insufficient support and resources have been dedicated to ensuring they have the financial wherewithal, business acumen, or established relationships with lending institutions to

participate adequately and overcome existing and historical injustices. Promoting increased financial literacy within the Indigenous economy is necessary to achieve economic reconciliation, including addressing Indigenous entrepreneurs' challenges in securing funding and capital. Increasing financial literacy will also contribute to individual and community well-being by ensuring Indigenous entrepreneurs can equitably participate in Canada's economy and have the knowledge, skills, and resources necessary to make informed financial and business decisions.

4. Scope of Services Required

Project timeframe

National survey stub and banner table results are requested by December 20th, 2024 and all deliverables must be submitted no later than January 30th, 2025.

What will the contractor be responsible for?

Support with questionnaire design and the successful completion of a national survey of Indigenous businesses utilizing a national Indigenous business directory and the jointly developed questionnaire with cleaned and weighted as appropriate stub and banner tables provided post-survey to CCIB researchers for use in future reporting.

Summary of deliverables

- **Questionnaire design:** We want to leverage your organizational expertise in the national survey questionnaire's development. CCIB staffers would formulate most of the questions but may seek advice and guidance on the national survey questionnaire's flow, coherency, and overall structure. The national survey will focus on the different characteristics and trends of Indigenous financial literacy in the business context. This study will provide the quantitative foundation for understanding the financial knowledge, skills, and behaviours of Indigenous business owners and entrepreneurs. This includes but is not limited to, providing insights into Indigenous businesses' financial management practices, including strengths, barriers, and areas for improvement.
- **National survey support:** After supporting the creation of the national survey questionnaire, CCIB would like your organization to administer the survey in the field.
- **Stub and banner table preparation:** Once the national survey has been administered and the participant response data has been collected, CCIB would like your

organization to compile the findings in stub and banner tables, weighted as appropriate, that can be used as input for reports or other deliverables associated with the project.

5. Specifications

What would we like to see from the successful bidder?

CCIB has created a weighted scoring model for assessing proposals that we receive. It is important to note that an unsatisfactory score on **Compliance Scoring Variables** will result in the automatic disqualification of the proposal in question. The factors that will be taken into consideration within this process include:

Compliance Scoring Variables				
Variable to consider	Explanation of variable value	Point scale	Weighting factor	Perfect category score
Internal capacity	Does the applicant have the necessary internal capacity to complete the work? If not, what elements will need to be subcontracted and what considerations are attached to it?	/5	x4	20
Project plan	Does the applicant have a well-defined project plan that reflects the required deliverables, explains	/5	x5	25



	them in detail, and provides clear methodologies?			
Engagement plan	Does the applicant have an adequate plan for how they will engage national survey participants? i.e. Methodologies attached to all work activities, an internal database of Indigenous businesses, and access to survey/data collection tools.	/5	x5	25
Schedule and project timeline	Does the applicant have a well-defined timeline for completing project activities that align with CCIB deadlines?	/5	x5	25
Budget	Does the applicant have a well-defined budget, payment schedule, and invoicing plan? Including a good value for work bid?	/5	x3	15



Portfolio	Can the applicant provide us with a portfolio of similar work that they have completed related to this current project?	/5	x5	25
Evaluation Criteria Total Score: /135				
Evaluation Scoring Variables				
Variable to consider	Explanation of variable value	Point scale	Weighting factor	Perfect category score
Indigeneity	Is the applicant's business 51 per cent or more Indigenous owned and controlled (First Nations, Métis, or Inuit)?	/5	x5	25
CCIB experience/work with non-profit organizations	Has the applicant successfully completed work with CCIB on other research or policy initiatives? Alternatively, has this company worked with non-profit organizations like CCIB in the past?	/5	x3	15

Credentials	Does the applicant have special designations or certifications (OCAP, TCPS II, or any other relevant Indigenous research-related certifications) that would support the successful completion of this work?	/5	x2	10
CCIB membership	Is the applicant an active member of CCIB?	/5	x2	10
Capacity building	If the applicant is awarded the RFP, will this significantly support their internal capacity development and ability to bid on larger contracts?	/5	x1	5
Compliance Criteria Total Score: /65				

6. Submission Requirements

The document is intended to encourage responses from potential bidders and to provide a fair and open process for proposing services all proposals must provide:

- a. An executive summary that highlights their understanding of the needs of CCIB and the approach and methodology that their proposal will fulfil those needs.

- b. Appendix A - Completed Submission form
- c. Appendix B - Completed project plan and budget
- d. Appendix C – CCIB participation points
- e. Appendix D – Completed evaluation criteria

7. Evaluation and Award Process

The proposals are evaluated by individuals with a vested interest and active participation in the selection process. All proposals are subject to a comprehensive analysis and evaluation based on the best overall value to CCIB. CCIB intends to retain the successful Bidder according to a “Best Value” basis, not a “Low Bid” basis. For CCIB to properly evaluate the proposals received, all proposals submitted must be formatted in accordance with the sequence noted above. All bids will be graded based on the following criteria:

8. Receipt of Proposals

Proposals can be sent electronically as an attachment in either PDF or Microsoft Word document format.

9. Contact Person for Successful Bidder

INSERT NAME:

INSERT TITLE:

INSERT CONTACT EMAIL:

INSERT CONTACT PHONE NUMBER:

10. Terms & Conditions

Commencement and Termination of Services

The majority of the work will take place from September 2024 to no later than January 30, 2025.



Work Performance

Performance of the work will be offsite – the successful bidder to carry out work in their office location and all communications will be via email, video conferences or telephone.

Security, Confidentiality and Intellectual Property

The Bidder shall not use any intellectual property of CCIB, including but not limited to, CCIB and CCIB partner and sponsor logos, registered trademarks, collected survey data, CCIB internal business lists, or trade names of CCIB, at any time without the prior written approval of CCIB. Any data generated and/ or intellectual property emerging from this project will be owned by CCIB.

Withdrawal or Amendment of Proposal

A Bidder may withdraw or make amends to a proposal by providing written notice to the CCIB contact person before the proposal submission deadline. A proposal may not be withdrawn or amended after the proposal submission deadline. CCIB has no obligation to return withdrawn or amended proposals.

CCIB Membership

If awarded the contract, the Bidder must become a CCIB member at their own expense unless they are already a current CCIB member. For more information:

<https://www.CCIB.com/membership/join-and-renewal/>.



APPENDIX A – SUBMISSION FORM

CCIB reserves the right to use its discretion to negotiate modifications to any proposal received without becoming obligated to negotiate with any other members.

Submission Information

Proposal Submitted by:	
Company Name	
Address	
Telephone	
Email	

Authorized Representative(s):

Name	
Position	
Telephone	
Email	

Please identify if you have any potential conflict of interest with CCIB:

I/We _____ the undersigned HEREBY DECLARE AND ACKNOWLEDGE:

THAT I/WE have examined the documentation and information contained in this RFP and its appendices, and acknowledge the requirements and conditions contained therein;

THAT I/WE are compliant with the conditions contained in the RFP;



THAT all statements in this Proposal are true and accurate in all respects;

THAT full disclosure has been made of any conflict of interest or potential conflict of interest;

THAT I/WE do hereby offer to enter into a contract to do all the work as described in the RFP and to complete the work to the full and complete satisfaction of CCIB for the sum bid;

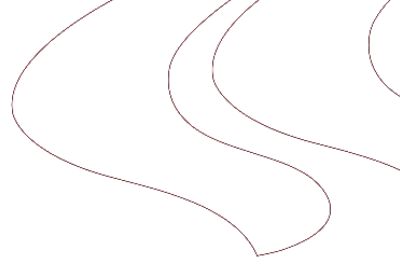
THAT MY/OUR proposal is irrevocable after close of bidding for a period of not less than thirty (30) calendar days from that date;

THAT the undersigned are duly authorized to execute this Proposal on behalf of:

Name of Vendor

Authorized Signature

Dated at _____, this _____ day of _____, 2024.
City, Province



APPENDIX B – PROJECT PLAN & BUDGET

The undersigned has carefully examined the information attached hereto, is fully informed as to CCIB’s requirements, and is prepared to submit a well-defined project plan and budget. The budget should demonstrate how the project work will be costed out over the project lifecycle, including but not limited to; staff salaries, professional fees, administrative costs, and potential costs associated with subcontracting work activities. If work is to be subcontracted for aspects of the project the successful bidder must indicate how they will cover these expenses within the proposed budget.

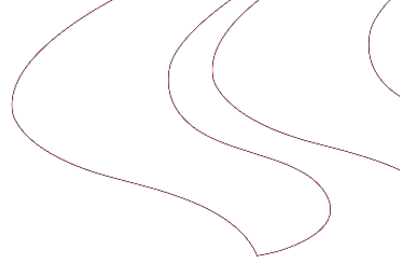
The successful bidder will also be required to submit a project plan that lays out the phases of work, work activities/ work breakdown structure, cost for each phase, phase and work activity timelines, applicant roles related to completion of work, potential support needs on behalf of CCIB, and makes a special emphasis on the following criteria pulled from the weighted scoring model being used for bid evaluation:

Evaluation variable	Variable assessment
Internal capacity	Does the applicant have the necessary internal capacity to complete the work? If not, what elements will need to be subcontracted and what considerations/costs are attached to it?
Project plan	Does the applicant have a well-defined project plan that meets the required deliverables and outlines key components of the project lifecycle mentioned above?
Engagement plan	Does the applicant have an adequate plan for how they will engage potential national survey participants?
Schedule and project timeline	Does the applicant have a well-defined timeline for completing project

	activities that align with CCIB deadlines?
Budget	Does the applicant have a well-defined project budget (details provided above), payment schedule, and invoicing plan? Does the proposal include a good value for work bid?
Portfolio	Can the applicant provide us with a portfolio of similar work that they have completed related to this current project?

APPENDIX C - CCIB PARTICIPATION POINTS

PAIR Program Participation	Yes	No
CCIB Certified Indigenous Business	Yes	No



APPENDIX D – EVALUATION CRITERIA

Compliance scoring variable	Description	Applicant response (circle or highlight a response)	Additional response content
CCIB experience/ prior non-profit experience	Has the applicant successfully completed work with CCIB on other research or policy initiatives? Alternatively, has this company worked with non-profit organizations like CCIB in the past?	<ul style="list-style-type: none"> • Yes • No 	
Credentials	Does the applicant have any relevant certifications (OCAP, TCPS II, or any other relevant Indigenous research-related certifications)?	<ul style="list-style-type: none"> • Yes • No 	
Indigeneity	Is the applicant's business 51 per cent or more	<ul style="list-style-type: none"> • Yes • No 	

	Indigenous owned and controlled (First Nations, Métis, or Inuit)?		
CCIB Membership	Is the applicant an active member of CCIB? If the applicant is currently an active member of CCIB, please indicate what type of membership.	<ul style="list-style-type: none"> • Yes • No 	
Capacity building	By winning the RFP, will this significantly support the internal capacity development and ability to bid on larger contracts for the applicant?	<ul style="list-style-type: none"> • Yes • No 	