



# Request for Proposals: Cost-Benefit Analysis

January 2022

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## Request for Proposals

Canadian Roots Exchange (CRE) invites your firm to respond to this Request for Proposals. CRE is seeking proposals from qualified consultants to assist in the development of a comprehensive cost benefit analysis of our current programs that will guide CRE's future program delivering. It is anticipated that the RFP process will commence January 6, 2022 and be completed by January 26, 2022. The final report is anticipated to be completed by March 31, 2022.

The successful proponent must have recent experience and understanding of the non-profit sector in general as well as working with Indigenous organization and governance structures. They will also have impact measurement experience including the ability to coordinate and facilitate the planning process, understand financial budgets, and program KPIs to create a cost-benefit analysis that is measurable and suitable for internal review and presentations.

## Context:

To ensure we're consistently delivering the most impactful, effective, and cost-efficient programming we are inviting firms to submit a proposal to create a cost benefit analysis. The focus of the RFP is to select a firm to provide a cost benefit analysis of the organization's core programs. As a recipient of this document, your firm has been identified as a potential candidate to satisfy CRE's requirements in this area, and this RFP is a tool to help us better understand your organization's relevant capabilities.

### KEY CONTACT:

Hillory Tenute  
*Interim Executive Director*  
hillory@canadianroots.ca  
613-302-9770  
489 College Street, Suite 203  
Toronto, ON, M6G 1A5

**DEADLINE:** Due Date for Submission of January 26, 2022 at 12:00pm EST

**DELIVERY:** PDF emailed to Nicole Maxwell - [nicole@canadianroots.ca](mailto:nicole@canadianroots.ca)

## Who We Are

Canadian Roots Exchange (CRE) is an Indigenous youth-led non-profit and registered charity (832296602RR0001). Since its establishment in 2008, CRE's mission is to provide pathways for Indigenous youth on their journey of self-determination and resilience in an effort to advance *reconciliation in their lifetime*.

In the 2019 federal budget, the Government of Canada named CRE as a leading Indigenous Youth organization to take up TRC Call to Action 66 for reconciliation and committed federal funding for a pilot project of \$15.2 million over three years (2019/2020 - 2022/2023). Budget 2019 set the goal of the pilot project as ensuring that "the voices of First Nations, Inuit and Métis are heard and to support Indigenous youth reconciliation initiatives." Funding supports the establishment of a distinctions-based national network of Indigenous youth, helps ensure that Government of Canada policies and programs are informed by the diverse voices of Indigenous youth, and provides support to community events, gatherings for Indigenous youth and reconciliation-focused community-based Indigenous youth activities, etc.

Since that time CRE has grown exponentially with offices in Toronto and Ottawa, ON and over 45 staff members (80% self-identify as Indigenous) working remotely from coast to coast.

## Our Core Tenants

As an Indigenous and youth led organization, we believe that a vision of a reconciled Canada is only possible through collective action and impact. As such all programs and granting opportunities have been created in an effort to support participants, community and partnership's:

- **Self-determination:** Indigenous youth have the confidence to create their own pathways to fulfill their own journeys of resiliency, capacity building, networking and solidarity.

- **Capacity Building:** Indigenous youth and partnerships are given the tools & resources to support their bundles throughout their lifetime;
- **Solidarity:** Participants are exposed to learning opportunities and experiences to build relationships amongst various Indigenous communities globally and non-Indigenous communities nationally;
- **Networking:** Building networks between Indigenous youth, CRE Alumni, and partnerships in sharing information, best practices, and creating opportunities.

## Programs & Granting Opportunities

We fulfill our mission through the following core programs:

- **Professional Employment and Education Readiness (Peer)**, programs that respond to transitional gaps that Indigenous youth (18-29) in urban, rural, and remote communities across Canada face when preparing for postsecondary education or employment.
- **Culture & Wellness**, workshops, ceremony, traditional teachings, Indigenous healing, non-verbal arts-based activity and to develop strong boundaries, healthy relationships and identity among Indigenous youth.
- **Policy**, increasing capacity for Indigenous youth to influence policy change through workshops, hackathons and a 9-month course for Indigenous youth on policy and government advocacy.
- **Research**, small grants for youth researchers and large-scale research projects in collaboration with other institutions.
- **CREation**, capacity-building support and funding to Indigenous youth-led projects and organizations.
- **Solidarity**, building relationships amongst various Indigenous communities globally and providing engagement opportunities to foster collaborative actions toward the empowerment and self-determination of Indigenous youth everywhere, regardless of their territory.
- **National Indigenous Youth Network**, a network of Indigenous youth and organizations sharing information, best practices, and opportunities.
- **Gatherings**, regional and national gatherings of youth.

## Governance Structure

CRE has begun to incorporate Indigenous governance processes into its structure. A national independent Board of Directors governs the business operations of the charity. The Community Advisory Circle (est. Fall 2021) and program-specific advisory boards provide guidance on CRE's charitable mission and activities. The Board of Directors hires the Executive Director, who in turn is responsible for the hiring of senior management. Our Board of Directors is currently our membership.

## Scope of Work

It is expected that the consultant will be responsible for providing expert advice and facilitation throughout the project and the following deliverables at a minimum:

1. Engage with CRE Finance team and Program Directors;
2. Review relevant projects and departmental reports, including organizational planning documents, contribution agreements, data and evaluation
3. Provide a comprehensive cost-benefit report
4. Present findings to CRE Leadership Team and Board of Directors Finance & Audit Committee

## Proposal Requirements

Each proposal will include the following elements:

- Executive Summary
- Outline of the firm's commitment to truth and reconciliation in Canada (Call to Action 92)
- Understanding of Scope and Objectives
- Approach and Timelines
- Experience and Qualifications of firm and proposed team, including 3 references and any history of work with Indigenous organizations or communities
- Fee structure, showing cost breakdown
- Draft Work plan

### Fee Structure

The audit fees are to be specified by fiscal year together with a schedule of hourly rates for each of the audit staff participating in the audit. Rates for any additional services available are to be provided in the quotation. All prices bid shall include applicable taxes, insurance and all other charges of every kind attributable to the work. This is intended to be a fixed price contract with no extras unless specifically provided for otherwise in this RFP. All work required or desired under the terms of this RFP is to be included in the price and the price is not to be subject to adjustment, including due to unknown or undisclosed conditions, increases in costs and taxes, cost of labour, unavailability of labour or materials, increases in cost of materials other than the changes in HST.

We welcome any questions about our organization, our work, and our operations that might help your firm prepare a stronger proposal. Please contact Nicole Maxwell at [nicole@canadianroots.ca](mailto:nicole@canadianroots.ca).

## Proposal Evaluation and Selection Process

### Metrics

- **Quality of the submission:** completeness, timeliness of submission, and quality (15%)
- **Cost-Benefit Analysis approach and schedule:** ability of the approach and schedule to respond to CRE's organizational planning and fundraising needs (15%)
- **Firm and team quality and experience:** necessary qualifications and knowledge and experience with Indigenous organizations, communities and charities and references. Provide 2-3 examples of projects in similar size and scope (25%)
- **Alignment with CRE mission and values:** commitment to truth and reconciliation and ability to form a strong working relationship (25%)
- **Fees and pricing:** cost effectiveness given the scope of work (15%)

## Key Dates

Listed below are the important events and the target dates and times by which the events are expected to be completed unless stated as must be completed elsewhere in this document:

- Issue of Request for Proposal January 6, 2022
- Proponent's Inquiries by January 19, 2022
- CRE answers by the end of January 21, 2022
- Due Date for Submission of Proposals January 26, 2022

- Short list interviews with CRE's Executive Director January 28, 2022
- Acceptance of Successful Proposal, if any, by January 31, 2022
- Completion of Project March 31, 2022.

### Closing Date & Time

Proposals, signed by the proponent's authorized representative, must be received by the Issuing Office, not later than 12:00 PM Eastern Standard Time, January 26<sup>th</sup>, 2022. CRE will not accept submissions of any Proposals after the Closing Date and Time. Any submissions received after the Closing Date and Time shall be considered disqualified.

## **Standard Terms and Conditions**

1. As an Indigenous organization, we will only engage in relationships with vendors that align with our values in regards to the Truth and Reconciliation Commission's Call to Action 92.
2. Qualified persons of Indigenous ancestry will be given preference in accordance with s. 16(1) of the Canadian Human Rights Act.
3. The submission of a proposal shall not in any manner oblige CRE to enter into a contract or to be responsible for the costs incurred by your organization in responding to this request.
4. All proposals will become the property of CRE.
5. Neither Canadian Roots Exchange nor its representatives bear any liability whatsoever regarding any costs or other burdens your firm may incur during the preparation, submission, and review of this RFP response.
6. Once all proposals are received, they will be considered by CRE and it is anticipated that a vendor partner(s) will be selected, whom CRE will then consider a preferred vendor(s). The selection of the vendor(s) will be at the sole discretion of CRE. CRE reserves the right to retain more than one vendor for the various products/services contemplated by this Request for Proposal and to retain vendors other than those to whom the Request has been sent.
7. Evaluation of vendor submissions will include a weighted scoring of qualitative criteria as outlined in the RFP document, as well as an evaluation of the financial aspects of the submissions. In the event of a tie score, the CRE proposal evaluation team will consider all available information, both tangible and intangible, and including but not limited to the information contained in the submissions, to arrive at a tiebreaking decision.
8. Any vendor submissions that do not meet mandatory criteria will be disqualified.
9. For the successful vendor(s), any or all answers and information contained within your proposal shall become part of the final agreement between your company and CRE.
10. Conflict of Interest: By submitting a proposal, the vendor certifies that no known conflict of interest exists between the vendor, CRE, or any related party with respect to the work described herein.
11. Agreement of Non-Disclosure: This document is considered to be proprietary and shall not be disclosed to any other party. It is designed, developed and submitted to potential partners of CRE solely for the benefit of CRE, along with our strategic partners.
12. Bid Rigging: The respondent certifies that any submitted proposal has been arrived at independently from that of any other bidder. Furthermore, the prices in the proposal have not been knowingly disclosed and will not knowingly be disclosed by the respondent prior to or after the awarding of any preferred relationship, directly or indirectly to any other bidder or competitor.
13. CRE reserves the right to engage or maintain vendors outside of the preferred vendor relationship.

14. At no time shall anyone be contacted in regards to this RFP other than the above listed contact person.