



Kinooomaadziwin Education Body

Request for Proposal

Study of Anishinabek Education System Self-Government Funding Formula Options

Table of Contents

- 1.0 General Overview.....3**
- 2.0 Anishinabek Education System (AES) Information.....3**
 - Participating First Nation and Local Education Authorities 3*
 - Regional Education Councils 3*
 - The Kinooaadziwin Education Body (KEB)..... 4*
 - KEB Chiefs Committee 5**
 - Youth Council..... 5**
- 2.0 AES Funding5**
- 3. The Project6**
 - 3.0 Purpose of Review 6
 - 3.1 Scope of Work..... 6
 - 3.1.1 Evaluation of Current Funding Formula 7**
 - 3.1.2 Assessment of Education Cost Drivers 7**
 - 3.1.3 Develop Options for Self-Government Funding Formula 8**
 - 3.2 Proposal Requirements 9
 - 3.2.1. Statement of Work and Schedule..... 9
 - 3.2.2. Qualifications of Firm..... 10
 - 3.2.3. Role of Firm..... 10
 - 3.2.4. Deliverables..... 11
 - 3.2.5. Project Timetable..... 11
- 4.0 Information Required - Qualifications.....11**
- 5.0 Information Required - Proposal12**
- 6.0 RFP – Submission Details.....13**
- 7.0 Scoring of Qualifications and Proposals.....13**
- 8.0 Pre-Submission and Other Information.....13**
- Appendix 1: Scoring Matrix14**
- Appendix 2: Organizational Structure15**
- Appendix 3: 2021-2022 Self-Government Funding.....16**
- Appendix 4: Current KEB Travel Rates17**
- Schedule “A”18**
- Price and Declaration Study of Anishinabek Education System Education Funding
Formula Options18**
- Schedule B - Detailed Components20**

1.0 General Overview

The Kinooaadziwin Education Body (KEB) is issuing a Request for Proposal (RFP) for the services of a Consulting Firm ('Firm') to complete a comprehensive assessment of self-government funding formula options for the Anishinabek Education System (AES). The assessment involves an analysis of existing funding models used for the allocation of education funding in Ontario, the allocation of education funding under First Nation self-government or other funding agreements, a literature review pertaining to First Nation education funding models, and an analysis of the cost-drivers of Participating First Nations' education costs.

It is understood that the information in the RFP is a combined Statement of Qualifications (Qualifications) and a Price Proposal (Proposal), and it shall be the general basis for the selection of a Firm to provide this professional service and study.

The KEB expects to select the highest-scoring Firm based on a structured scoring evaluation. The scoring evaluation (Section 7 and Appendix 1) shall consider each Firm's ability to perform the required service, experience, approach to the project, the personnel assigned to the actual project work, the proposed fees and costs, the time-period in which the project will be completed, the reference checks and the clarity of the submission, in relation to the scoring matrix.

2.0 Anishinabek Education System (AES) Information

The AES is comprised of the Participating First Nations, Local Education Authorities, Regional Education Councils, and the KEB.

Participating First Nation and Local Education Authorities

Each Participating First Nation has law-making authority over education on-reserve, from Junior Kindergarten to Grade 12. A Participating First Nation may set up a Local Education Authority (education board or committee) to support and manage education programs and services at the community level. There are currently 23 Participating First Nations in the Anishinabek Education System. These First Nations vary significantly in terms of overall population and student population. One First Nation operates schools from JK to Grade 12. Other First Nations operate elementary schools only. One First Nation only operates a high school. Many of the First Nations do not operate schools on-reserve. A complete list of all the Participating First Nations is set out in Figure 1 on the following page.

Regional Education Councils

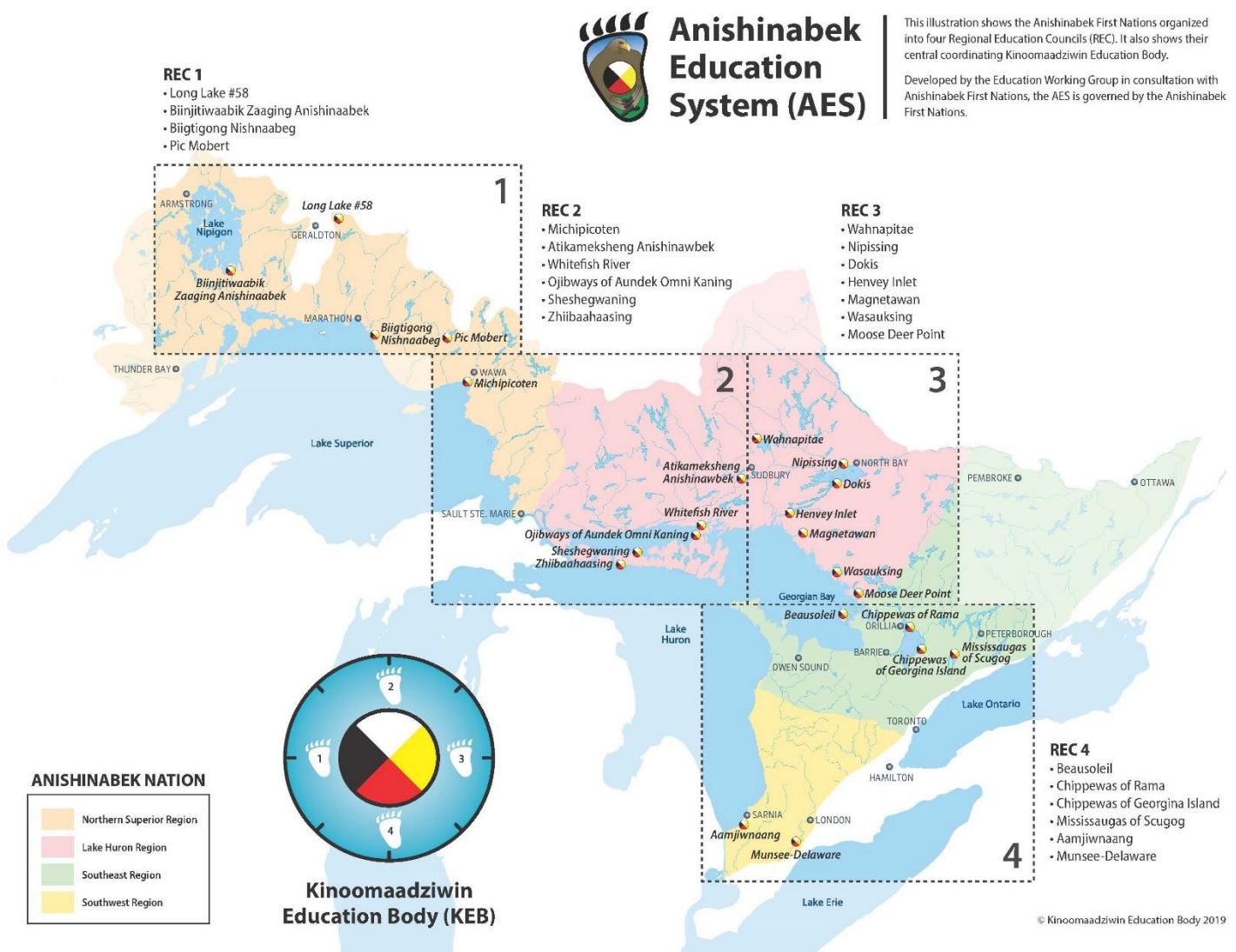
Each Participating First Nation belongs to one Regional Education Council (REC). The REC provides opportunities for networking, for determining First Nation and regional education priorities, and to provide input to the KEB. A Regional Education Council Coordinator supports the activities of each Regional Education Council. Each Participating First Nation appoints two representatives as Regional Education Council members to represent the First Nation at Regional Education Council meetings that occur at least twice each year.

The Kinooaadziwin Education Body (KEB)

Participating First Nations work together through a central administrative structure called the Kinooaadziwin Education Body (KEB). The KEB takes direction from the Participating First Nations. The KEB supports the First Nations in their delivery of education programs and services and liaises with the Province of Ontario on education matters. The KEB also negotiates with the Government of Canada for additional financial resources to meet the Participating First Nations' education needs.

Figure 1 below provides an overview of the Anishinabek Education System structure, including a list of all PFNs within each region.

Figure 1



In Appendix 2 of this RFP is a copy of the KEB Organizational Structure.

KEB Chiefs Committee

By resolution of the Participating First Nations, a committee comprised of one Chief from each Regional Education Council was created to provide political support, advocacy, and guidance to the KEB Board of Directors.

Youth Council

The KEB is in the process of establishing a Youth Council.

2.0 AES Funding

The Kinooaadziwin Education Body receives the following funding for education governance and for the delivery of programs and services under the AES.

1. Funding for the implementation and governance of the education self-government agreement and the delivery of agreed education programs and services is provided by Canada under the Anishinabek Nation Education Transfer Agreement (ANEFTA). The AES is in year 4 of the 5-year ANEFTA and negotiation discussions have started for renewal of a fiscal agreement beyond March 31, 2023. This RFP focusses on funding received from Canada under the ANEFTA. Appendix 3 contains the 2021/2022 self-government funding for the AES.
2. Funding for support and services to aid in the success of Anishinabek students attending First Nations' schools and provincially funded schools is provided by the Government of Ontario under a Transfer Payment Agreement (TPA). The AES is in the final year of the 3-year TPA. Negotiations for renewal of the TPA have concluded, and the new agreement will be effective September 1, 2021.
3. Additional funding is received from Canada, under contribution agreements, for specific items such as enhanced post-secondary services, enhanced COVID-19 support for post-secondary students, and Indigenous Community Support funding for education COVID-19 response.

The federal government provides self-government funding to the AES based on formulae outlined in the ANEFTA. A base amount was agreed to for education governance and education programs and services. The base amount is adjusted by price, equivalent to the ratio of the annual change in the Federal Domestic Demand Implicit Price Index, and volume, equivalent to the ratio of annual change in the AES student count. The PFNs have full discretion to allocate and expend self-government funds. There is no legal requirement to use the formula outlined in the ANEFTA.

The KEB transfers funding to each PFN, annually, under a Funding Allocation Agreement. Since the launch of the AES on April 1, 2018, the KEB has been using the funding formula outlined in the ANEFTA to allocate funding the PFNs.

Prior to the launch of the AES, the PFNs intended to establish an AES-specific formula for self-government funding after implementation. It was recognized that time would be needed to research and assess the factors that affect education costs before a funding allocation formula

could be developed. Three years has passed since the AES commenced implementation. The KEB Board of Directors wish to follow-through on the PFNs' intentions and develop an AES self-government funding allocation formula. It is anticipated that the funding formula will balance the needs of the individual PFNs and the needs of the AES, system-wide. The KEB is engaging a Firm to develop funding formula options for the PFNs to review and approve. The funding formula options will be reviewed by the Board of Directors, and a recommendation will be provided to the PFNs for their approval.

3. The Project

3.0 Purpose of Review

The purpose of this project is to assess and develop funding formula options for the transfer of education self-government funding to the PFNs. The objective of the study is to:

1. provide a report on the cost drivers of governing and delivering education programs and services within the Anishinabek Education System; and
2. provide funding formula options for the transfer of education governance and education programs and services self-government funding to the PFNs that balance the needs of the AES, as a whole, and the needs of the individual PFNs.

3.1 Scope of Work

The successful Firm will develop and execute a process in consideration of the following guidelines/requirements and having regard for the purpose of the review as set out in section

An ad hoc Self-Government Funding Formula Working Group of interested Participating First Nations is being established to support the work of the Firm. The purpose of the Working Group is to provide guidance and assistance in the development of the self-government funding formula. The Firm will be required to regularly engage with the Working Group to gain assistance in identifying:

- a. principles and/or values that are important to the AES to consider in the development of the self-government funding formula;
- b. factors that affect education costs to consider in the self-government funding formula; and,
- c. priorities to apply to the factors in the options for a self-government funding formula.

While PFN engagement is expected to occur through the Working Group, engagement of PFNs may also involve individual discussions with PFN representatives.

It is anticipated that meetings will be conducted with the PFNs, primarily through the Self-Government Funding Formula Working Group, the KEB Board of Directors and KEB staff through electronic means such as videoconference and teleconference due to current

COVID-19 pandemic related restrictions. However, in-person meetings may be held during the fall of 2021 into 2022. The successful Firm may expect to attend in-person fall meetings to present findings to date. It is recommended that the firm may use existing meetings to engage groups. The following list outlines the meetings that are expected for the AES:

1. The RECs hold periodic meetings. All 4 RECs are expected to hold meetings in the fall of 2021.
2. A meeting of all 23 PFNs is also expected in the fall of 2021.
3. Board meetings are held every 3 weeks. They are currently held virtually, but in-person meetings may be expected. The successful Firm may expect to attend an in-person Board of Directors meeting in early 2022 to present the draft final report, including funding formula options.
4. A February 2022 PFN meeting may be held either virtually or in-person.

3.1.1 Evaluation of Current Funding Formula

1. Evaluate current government formula used for the allocation of education programs and services funding including:
 - a. current ANEFTA funding distribution formula;
 - b. Indigenous Services Canada - Ontario Interim Funding Approach for Kindergarten to Grade 12; and;
 - c. current Ontario Grants for Student Needs.
2. Review other self-government education governance funding allocations and funding formula for education programs and services including the:
 - a. First Nations Education Steering Committee;
 - b. Mi'kmaw Kina'matnewey;
 - c. Yukon Council of First Nations Funding Allocation; and,
 - d. Maskwacis Education Schools Commission.

3.1.2 Assessment of Education Cost Drivers

1. Identify, confirm, and prioritize principles and/or values that are important for the AES to consider in the development of the self-government funding formula by engaging with the PFNs and the KEB. Principles and/or values may include, but are not limited to, the following:
 - a. Funding must be allocated in an equitable manner that overcomes disadvantages that PFNs may experience;
 - b. PFNs with schools incur costs not incurred by PFNs without schools;

- c. The development and maintenance of language and culture is important to all PFNs;
 - d. It is important to consider the impact of funding allocations to the individual PFNs and to the AES, system-wide; and,
 - e. All PFNs have a need for provincial student support because they interact with the provincial schools to support their students.
2. Review existing reports on First Nations education funding including, but not limited to:
 - a. Chiefs of Ontario Review of the Band Operated Funding Formula for Education; and
 - b. Office of the Parliamentary Budget Officer Federal Spending on Primary and Secondary Education on First Nation Reserves.
 3. Research and assess cost drivers of education governance and the delivery of education programs and services within the AES. This may include:
 - a. engagement with the PFNs, KEB Board of Directors and KEB senior management, which may include group and individual meetings;
 - b. review of the KEB organizational review;
 - c. review the historical cost of tuition fees paid to school boards by First Nations and identify trends and/or factors to tuition fee increases;
 - d. forecast cost trends, based on historical data available; and,
 - e. identify cost drivers that are fixed and variable including factors that affect the costs.
 4. Confirm factors to consider in the AES self-government funding formula.
 - a. Provide options for factors to consider in the AES self-government funding formula;
 - b. Complete a priority matrix comparing the factors to AES allocation principles/values; and,
 - c. Confirm factors to include in the self-government funding formula options.

3.1.3 Develop Options for Self-Government Funding Formula

1. Gather and assess data pertaining to factors confirmed, above, that may be used within the self-government funding formula. This may include, but is not limited to:
 - a. Student enrollment data for JK to Grade 12 and post-secondary, residing both on and off-reserve (Note: on-reserve student data will be available from the KEB. Student data pertaining to off-reserve students may require data collection from PFNs,

research and extrapolation of data);

- b. School size, i.e. square meters of First Nation schools, grade levels (Note: This information is available within the KEB and will be provided to the Firm);
 - c. Remoteness/distance from urban centres;
 - d. Ability to access services;
 - e. Distance to provincial schools attended by PFN students (Note: The KEB will provide a list of provincial schools to which each PFN sends their on-reserve students);
 - f. Number of Students with special education needs/nature of special education need;
 - g. Number of school busses for each PFN;
 - h. Social economic indicators, where available;
 - i. requirements for education governance funding; and,
 - j. Others to be confirmed
2. Based on the findings, develop options for the allocation of self-government funding for the following:
 - a. JK to Grade 12;
 - b. Post-Secondary Student Support; and,
 - c. Education Governance.
 3. Complete an analysis of funding formula options, using PFN data collected, and compare the options with the funding formula principles and/or values of the AES.
 4. Gain feedback on the funding formula options by engaging with the Self-Government Funding Formula Working Group, PFNs and KEB Board of Directors.

3.2 Proposal Requirements

3.2.1. Statement of Work and Schedule

The Firm shall provide a statement of work that demonstrates:

- how it proposes to achieve the objectives and scope of work, including a proposed schedule; and,
- how it will engage the Self-Government Funding Formula Working Group, PFNs, KEB Board of Directors and KEB staff to gain their input, priorities and required data

for the funding principles/values and the funding formula.

3.2.2. Qualifications of Firm

The Firm shall demonstrate:

- a thorough knowledge and understanding of education funding;
- experience conducting analysis of First Nation funding;
- expertise and capacity to perform the necessary scope of work and engagement with the Participating First Nations;
- several years of experience in working with First Nations and First Nation organizations in Ontario; and,
- demonstrated ability to conduct research, write reports and deliver the reports on time and on budget.

3.2.3. Role of Firm

The Firm will provide independent expertise and advice and shall:

- guide, manage and monitor the progress of the study;
- identify and implement methods to engage and obtain feedback/involvement from the Self-Government Funding Formula Working Group, PFNs and the KEB Board and staff;
- prepare and execute a project communications plan to keep the KEB Board of Directors and Director of Education informed of the progress of the study;
- prepare, provide, and present PowerPoint pertaining to education cost drivers and factors to consider in the AES self-government funding formula;
- prepare, provide, and present a preliminary report to summarize key findings and key issues requiring consideration that will be included in the report;
- prepare, provide, and present a draft report to the Self-Government Funding Formula Working Group, PFNs and KEB Board of Directors on options for a self-government funding formula;
- prepare a final report incorporating any changes after reviews of draft(s); and,
- present an overview of the self-government funding formula report, and recommendations, at a meeting of the PFNs.

3.2.4. Deliverables

The following items shall be delivered to the KEB upon completion of the final report:

- one (1) electronic copy of the final report in Microsoft Word, to include background, summary of engagement, education funding principles and values statements, the evaluation of education funding formula and approaches, the assessment of AES cost drivers, and options for self-government funding formula;
- all materials received and produced by the Firm in the undertaking of this project; and,
- in general, all reports and presentation materials shall be in a form and of a quality to be acceptable for reproduction and presentation and shall be acceptable to the KEB Board of Directors. All information and files required to complete this project will become property of the KEB.

3.2.5. Project Timetable

Activity	Date
Request for Proposal Issued	July 13, 2021
Request for Proposal Closed	August 6, 2021
Selection of Successful Firm	August 20, 2021
Study Commences	August 30, 2021
Presentation of AES Cost Drivers	January 7, 2022
Submission of Draft Report	2 weeks in advance of Presentation Date of Draft Report
Presentation of Draft Report	February 18, 2022
Final Report	March 18, 2022
Presentation of Report at PFN Meeting	By end of fiscal year (March 31, 2022)

Note: although every attempt will be made to meet all dates, the KEB reserves the right to modify any or all dates at its sole discretion.

4.0 Information Required - Qualifications

Each Firm shall respond to each of the following questions in a clear and comprehensive manner.

- a) Provide the full name and main office address of the Firm.
- b) Identify when the Firm was organized and, if a Corporation, when incorporated and

how many years engaged in providing this type of service.

- c) Identify and set out the qualifications of any Firms or individuals that the Firm intends to subcontract, or otherwise use, to perform work on this project.
- d) Describe the Firm's specific and relevant experience related to the scope of this project.
- e) Describe the Firm's depth and resources that would also be available for the benefit of this project.
- f) Describe the Firm's understanding of the Project – Scope of Work and approach to complete the project, engagement and how it will achieve the timetable. Include innovative approaches that will be used to gain acceptance and allow for a better understanding of the project's goals.
- g) Set out the various components of the project including demonstrating how the project will be completed.
- h) Identify the personnel who would take the lead position in this project and set out their particular qualifications and experience in carrying out this type of work.
- i) Identify the amount of KEB staff time required.
- j) Provide references from three (3) recent projects that relate to this project that the Firm has completed and, if not included in the foregoing, a reference from a First Nation regional organization in Ontario.

5.0 Information Required - Proposal

Each Firm must respond to each of the following areas in a clear and comprehensive manner.

- a) Provide a confirmed price for the project and expected payment schedule (Schedule A).
- b) Specifically identify anticipated costs associated with travel to participate at in-person meetings. These costs will be reimbursed based on KEB travel rates, listed in Appendix 4, in effect at the time of travel.
- c) Any additional work or services that exceed the services requested herein and the associated costs thereof.
- d) A detailed project schedule including timelines for each component of the project.
- e) Complete "Schedule B – Detailed Components"

6.0 RFP – Submission Details

Event Detail	Date
Request for Proposal (RFP) Issued	July 13, 2021
Submission Deadline	11:59:59 am (noon) August 6, 2021

Each Firm shall submit an electronic proposal no later than **11:59:59 a.m. (noon) on August 6, 2021** to the **Director of Education for the KEB, Christine Dokis** at christine.dokis@a-e-s.ca.

The subject line for the email should state "Request for Proposal – Study of AES Self-Government Funding Formula Options". Any Proposals received after the above deadline will not be accepted for review by the KEB and an email reply confirming this will be sent to the Firm.

7.0 Scoring of Qualifications and Proposals

The evaluation of the RFP will be carried out by an evaluation team comprised of the Board of Directors and staff. Firms will be evaluated based on the points system identified in Appendix 1. Failure to provide relevant information may result in penalties being assessed on the evaluation score.

In addition, and at the sole discretion of the evaluation team, an interview may be required. The purpose of this interview would be to clarify the qualifications of the Firm and details of the proposal.

8.0 Pre-Submission and Other Information

If any Firm has questions concerning this RFP, finds discrepancies or omissions in the document, or requires clarifications, such matters shall be submitted in writing to:

Christine Dokis Telephone 244-377-5063
 E-mail christine.dokis@a-e-s.ca

Contact with the KEB Board of Directors or KEB staff is prohibited and can be considered as grounds for disqualification from the selection process.

The KEB reserves the right to request additional data or information after the Proposal date, if such data or information is considered pertinent, in the KEB's sole view, to aid the review and evaluation process.

The KEB reserves the right to supplement, add to, delete from, and change this solicitation document. Firms will be advised by fax or e-mail of any changes that are made.

The KEB reserves the right to reject any portion of any RFP and/or reject all RFPs, to waive any informalities or irregularities in the RFP, or to re-invite, or to advertise.

Appendix 1: Scoring Matrix

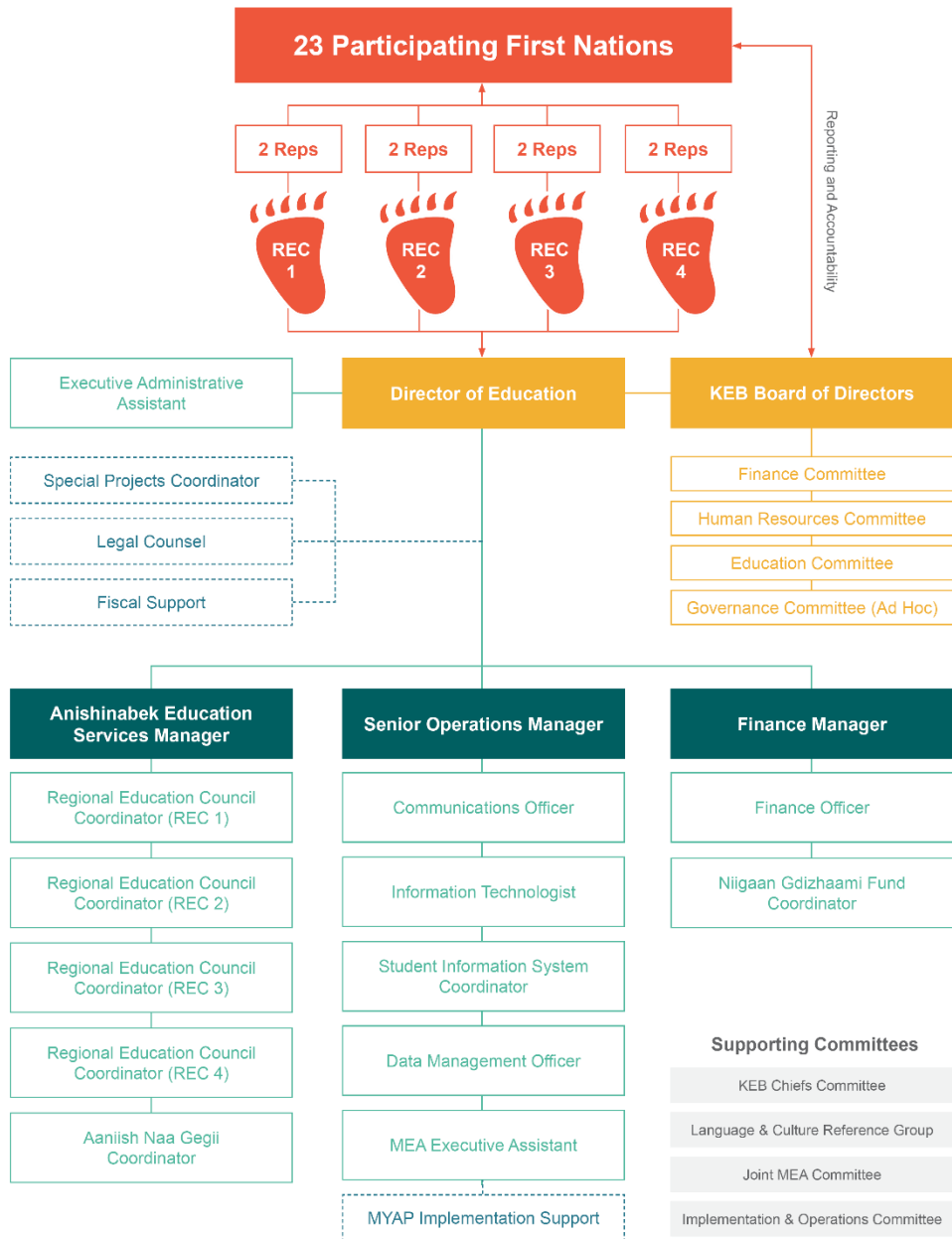
Criteria	Maximum Points	Points Scored
1. Firm and Key Personnel Experience <ul style="list-style-type: none"> • Direct Firm and principal staff experience with relevant experience. • The experience of the members of the Firm that will be assigned to this project. • Appropriate reference information gathered from customers that the Firm has provided like services. 	10 15 5	
2. Project Approach <ul style="list-style-type: none"> • Quality of overall approach, work methodology, identification of project constraints. • Work plan and schedule (responsiveness to meet or exceed requirements). 	15 15	
3. Consulting Services Cost <ul style="list-style-type: none"> • Cost of consulting services with details as to the method and basis of compensation including a breakdown of overall cost including all fees and other charges. 	40	
4. Anishinabek Firm or Anishinabek members working on this project from a Firm.	10	
Total Score	110	

Appendix 2: Organizational Structure



**ANISHINABEK
EDUCATION SYSTEM**

**Anishinabek Education System
Organizational Chart**



KEB Kinooomaadziwin Education Body
 MEA Master Education Agreement
 MYAP Multi-Year Action Plan
 REC Regional Education Council

© Kinooomaadziwin Education Body 2020

Anishinabek Education System Organizational Chart

Appendix 3: 2021-2022 Self-Government Funding

Education Programs and Services ¹	\$52,796,744.84
Governance ²	3,970,035.15
Education Transformation (JK – 12) ³	1,656,051.00
K – 12 Adjustor ⁴	66,904.44
Total 2021-2022 Self-Government Funding	\$58,489,735.42

Notes:

1. Education programs and services funding, excluding, band employee benefits and band support funding are adjusted annually by price and student enrollment factors. The 2021-2022 adjustment factors are listed in Table 1.

Table 1

ADJUSTORS FORMULA	
*(FDDIPI X STUDENTS ENROLLMENT) (VA = 0.97323) x (PA = 1.01873) = 0.99147	2021-2022
Price Formula	1.01873
Student Enrollment Formula	0.97551
PRICE & STUDENT ENROLLMENT Applicable Formula	0.99379

2. Governance, band employee benefits and band support funding are adjusted annually by a price factor. The 2021-2022 price adjustor is listed in Table 2.
3. Education Transformation funding is a 5-year budget commitment, using an interim funding formula, for the transformation of education on First Nations.
4. The K-12 Adjustor is a 2% adjustment provided by Indigenous Services Canada for Education Transformation funding pertaining to the 2020-2021 fiscal year.

Appendix 4: Current KEB Travel Rates

Description	Rate
Meals:	
Breakfast	\$17.15
Lunch	\$18.05
Dinner	\$45.95
Incidentals	\$17.30
Private Accommodation	\$50.00
Mileage	\$0.555/km

Schedule “A”

(Schedule to be completed and returned)

Price and Declaration Study of Anishinabek Education System Education Funding Formula Options

Information to the Respondent.

In order for the RFP to be complete, all areas of the Price and Declaration - Schedule "A" (this form) must be completed and any other information as requested in the RFP must be provided.

Price

The total price to complete the Study of Self-Government Funding Formula Options for the Anishinabek Education System.

\$ _____ **Grand Total**

Complete Schedule “B” to provide a detailed costing by component.

Expected Payment Schedule

Declaration

- 1. I/We Declare that this RFP is made without any connection, knowledge, comparison of figures or arrangements with any other company, firm or person making an RFP for the same purchase and is in all respects fair and without collusion or fraud.
- 2. I/We Declare that all matters stated in the submitted RFP are in all respects true.
- 3. I/We have carefully read the requirements as per the RFP and have satisfied ourselves as to the conditions under which the transaction and subsequent items are to be supplied and do hereby submit an RFP for **Consulting Services for the Study of Anishinabek Education System Self-Government Funding Formula Options.**
- 4. I/We acknowledge that_____addenda have been received and that it is my/our ultimate responsibility to ensure all addenda issued have been received.
- 5. If selected as the successful Firm, I/we agree to abide by the terms as set out in the RFP Qualifications and Price with its specifications and provisions for the prices shown.
- 6. The price submitted shall be firm for a period of not less than sixty (60) calendar days from the closing date of this RFP.

Dated at _____ this _____ day of _____ 2021.

) _____
) Signature
)

) _____
) Signing Authority (Print Name)
)

) _____
) Company Name
)

) _____
) Street Address/City/Town/Postal Code
)

) _____
) Telephone Email Fax Number

Schedule B - Detailed Components

Details of Consulting Services				
	Action Item	Expected Deliverable	Cost/Action	Notes
Study of AES Self-Government Funding Formula Options	Evaluation of Current Ontario Grant for Student Needs and First Nation Education Funding Formulae	Comparison of current funding formulae, identifying the advantages and disadvantages of each. Overview of education self-government funding formulae, identifying key cost drivers of each.		
	Assessment of AES Cost Drivers	Prioritized list of AES principles/values for the allocation of self-government funding. Summary of PFN and KEB input pertaining to AES cost drivers. Summary of existing reports highlighting critiques of First Nation education funding and recommendations, if any, for funding allocations. Presentation of AES cost drivers.		
	Options for AES Self-Government Funding Formula	At least 3 options for self-government allocation formula for governance and education programs services, including Junior Kindergarten to Grade 12 and Post-Secondary Student Support. Analysis of funding formula options in comparison to AES principles/values.		
	Prepare and Present Preliminary Findings Report	Preliminary report for the Self-Government Funding Formula Working Group, KEB Board of Directors and Director of Education. Present to the Self-Government Funding Formula Working Group and Board of Directors.		
	Prepare Draft Report	Draft report for the KEB Board of Directors and Director of Education. Present to Board of Directors.		
	Prepare and Present Final Report	Final Report for the Participating First Nations. Present to Participating First Nations.		

Additional Pricing - list details

Grand Total

(Matches Schedule A - Price)