



# **Kinoomaadziwin Education Body**

## **Request for Proposals**

### **Fiscal Analysis**

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## **1.0 General Overview**

The Kinoomaadziwin Education Body (KEB) is issuing a Request for Proposal (RFP) for fiscal analysis to support the Anishinabek Education System fiscal renewal negotiations and gain additional funding to meet student, family, and community education and learning needs.

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/Individual to provide this professional service.

The KEB expects to select the highest-scoring Firm/Individual based on a structured scoring evaluation. The scoring evaluation (Section 7 and Appendix 1) shall consider each Firm/Individual'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 only. 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.

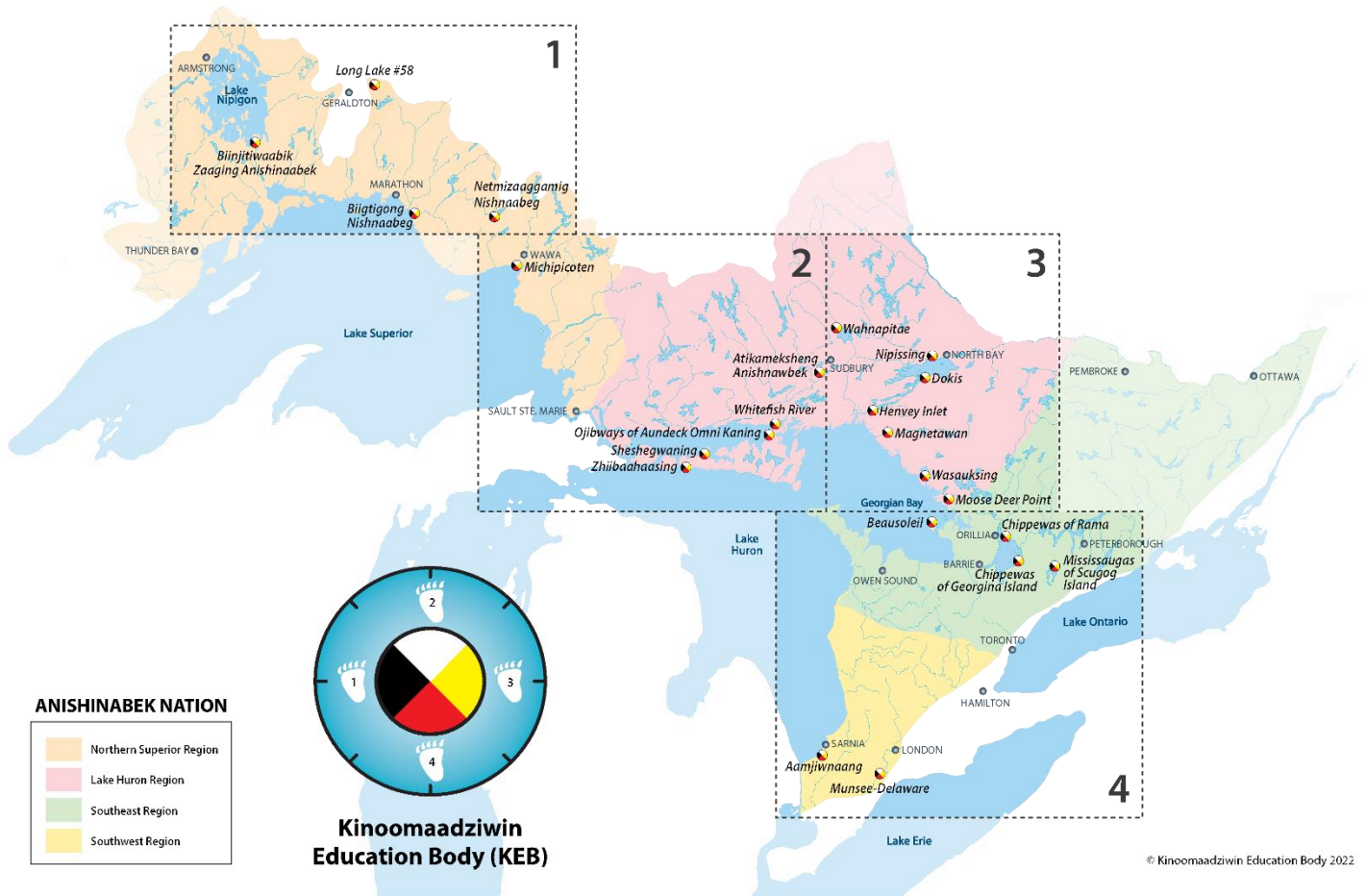
### ***The Kinoomaadziwin Education Body (KEB)***

Participating First Nations work together through a central administrative structure called the 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 AES 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 Fiscal Negotiations**

The KEB 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 5 of the ANEFTA and negotiation discussions have started for renewal the fiscal agreement. This RFP focusses on fiscal analysis to support the fiscal renewal negotiations with Canada. 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).
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 AES negotiating team includes the Enaagdenjget/Director of Education, Legal Counsel/Fiscal Negotiator, Accountant/Fiscal Analyst and Participating First Nations representatives. The AES negotiating team meets monthly with the federal negotiations team to advance positions for additional funding to support the AES needs including needs that are specific the Participating First Nations and the KEB.

## **3. The Project**

### **3.0 Purpose of Review**

The purpose of this project is to undertake fiscal analysis to support the AES fiscal renewal negotiations with the Government of Canada. The objective of the project is to:

1. Gather and analyze information to inform fiscal negotiating positions for the AES; and
2. Explain the fiscal analysis to the fiscal negotiating team.

### **3.1 Scope of Work**

The successful Firm/Individual will conduct a fiscal analysis and provide a written summary of their fiscal analysis to support the AES negotiating team to advance positions for additional funding from the Government of Canada. The scope of work includes the following:

1. Complete an analysis of increased tuition fees charged by the 17 District School Boards, starting with the 2018/2019 school year, to determine the rate of tuition fee increases across school boards over the past 5 years and estimate the tuition fee gap between provincial tuition funding that was brought into the ANEFTA and the tuition fees currently charged by District School Boards.
2. Complete an analysis of the compensation gap between wages and benefits paid by District School Boards and by Participating First Nations for education assistants, teachers, principals, education administrators, and other staff.
3. Complete an analysis of the volume adjustor used within the ANEFTA in comparison with the option of a 5-year rolling average volume adjustor and compare the funding that would be available using the different methodologies.
4. Review the current price and volume adjustors in comparison to proposed new adjustors and project the impact of the different price and volume adjustors on the annual transfer payments.
5. Determine options for an appropriate volume adjustor for post-secondary student support funding.
6. Review the K-12 enhancements and refinements funded by Canada to determine any gaps in funding between the transfer payments under the ANEFTA and provincial funding for K-12 education.
7. Complete an analysis of population data available for adult populations of the Participating First Nations.

### **3.2 Proposal Requirements**

#### **3.2.1. Statement of Work and Schedule**

The Firm/Individual shall provide a statement of work that demonstrates:

- how it proposes to achieve the objectives and scope of work, including a proposed schedule;

- proposed meeting schedule with the AES negotiating team to demonstrate an effective communications plan; and
- how it will engage with the AES negotiating team and KEB staff to gain information required for analysis.

### **3.2.2. Qualifications of Firm/Individual**

The Firm/Individual shall demonstrate:

- An understanding of the AES and the 23 Participating First Nations;
- Understanding of Indigenous education funding and/or environments;
- Understanding of the scope of work;
- Experience conducting fiscal and/or statistical data analysis; and
- Effective written communications.

### **3.2.3. Role of Firm/Individual**

The Firm/Individual will provide independent expertise and advice and shall:

- conduct and regularly report the progress of the fiscal analysis;
- prepare and execute a project communications plan to keep the AES fiscal negotiating team informed of the progress of the fiscal analysis;
- prepare, provide, and present MS Word and/or Excel documents pertaining to study/project; and
- prepare a final report incorporating any changes after reviews of draft(s).

### **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 fiscal analysis documents in Microsoft Word and/or Excel, to include:
  - Summary
  - Backgrounder

- Methodology
- Analysis
- Recommendations
- Next Steps

- all materials received and produced by the Firm/Individual 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	February 23, 2023
Request for Proposal Closed	March 24, 2023
Selection of Successful Firm/Individual	March 31, 2023
Work Commences	April 10 2023
Presentation of findings	May 8-12, 2023
Submission of Draft Report	2 weeks in advance of Presentation Date of Draft Report
Presentation of Draft Report	May 22-26, 2023
Final Documents	June 2, 2023

**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/Individual 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/Individual.
- b) Identify when the Firm/Individual 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/Individual intends to subcontract, or otherwise use, to perform work on this project.



- d) Describe the Firm's/Individual's specific and relevant experience related to the scope of this project.
- e) Describe the Firm's/Individual's depth and resources that would also be available for the benefit of this project.
- f) Describe the Firm's/Individual'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 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/Individual 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/Individual 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	February 23, 2023

Submission Deadline	March 24, 2023
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Each Firm/Individual shall submit an electronic proposal no later than **11:59:59 a.m. (noon) on March 24, 2023** to **Kyesha Fong, Human Resources Officer** at [kyesha.fong@a-e-s.ca](mailto:kyesha.fong@a-e-s.ca) .

The subject line for the email should state "Request for Proposal – Fiscal Analysis." 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/Individual.

## **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/Individuals 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/Individual and details of the proposal.

## **8.0 Pre-Submission and Other Information**

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

<b>Kyesha Fong</b>	Telephone	705-845-3634 ext. 202
Human Resources Officer	E-mail	<a href="mailto:kyesha.fong@a-e-s.ca">kyesha.fong@a-e-s.ca</a>

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.

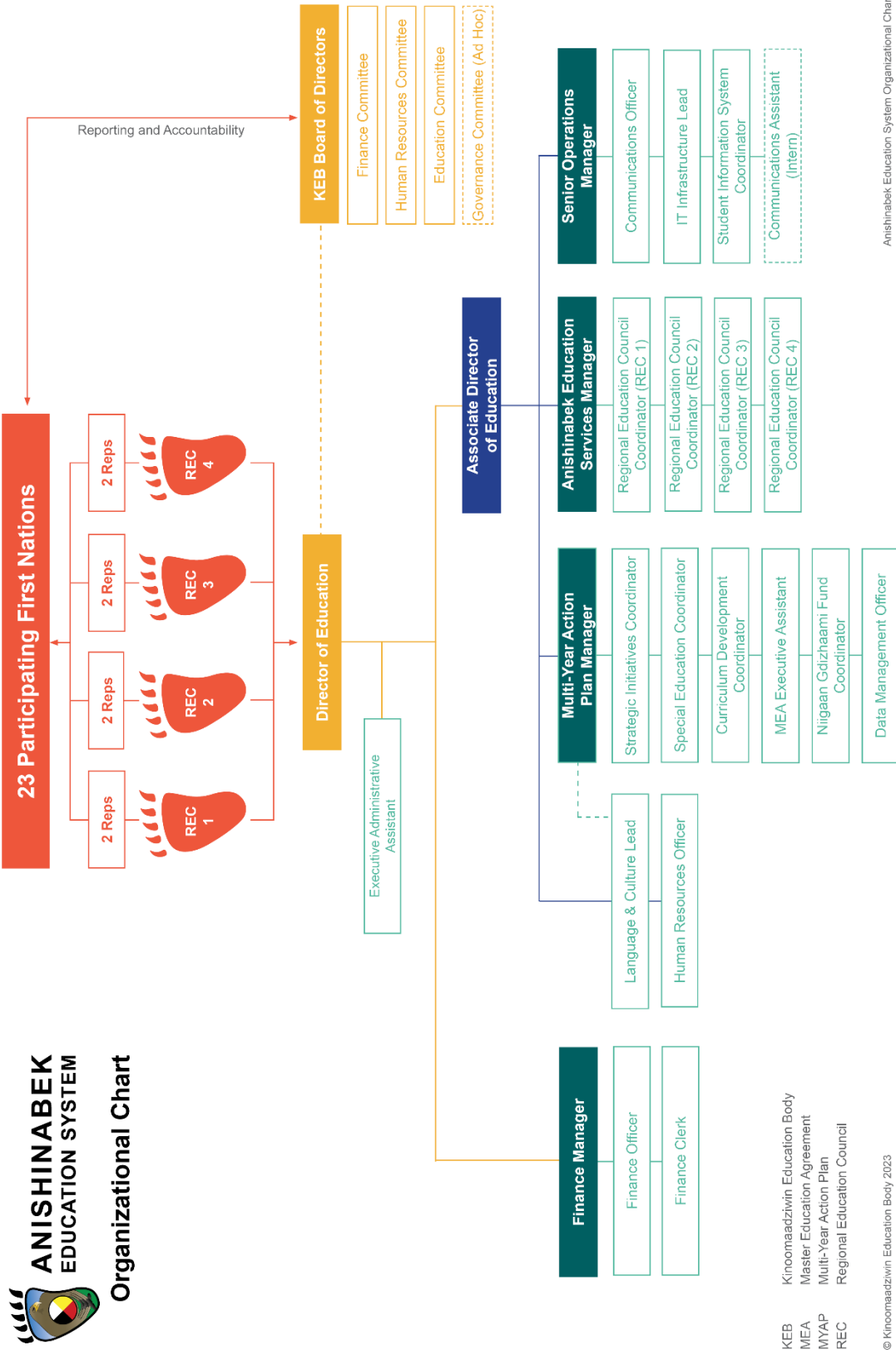
The KEB reserves the right to supplement, add to, delete from, and change this solicitation document. Firms/Individuals will be advised by fax or e-mail of any changes that are made.

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"> <li>• Direct Firm and principal staff experience with relevant experience.</li> <li>• The experience of the members of the Firm that will be assigned to this project.</li> <li>• Appropriate reference information gathered from customers that the Firm has provided like services.</li> </ul>	10  15  5	
2. Project Approach <ul style="list-style-type: none"> <li>• Quality of overall approach, work methodology, identification of project constraints.</li> <li>• Work plan and schedule (responsiveness to meet or exceed requirements).</li> </ul>	15  15	
3. Consulting Services Cost <ul style="list-style-type: none"> <li>• 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.</li> </ul>	40	
4. Anishinabek Firm or Anishinabek members working on this project from a Firm.	10	
<b>Total Score</b>	<b>110</b>	

# Appendix 2: Organizational Structure



Anishinabek Education System Organizational Chart

### Appendix 3: 2021-2022 Self-Government Funding

Education Programs and Services	\$52,796,744.84
Governance	3,970,035.15
Education Transformation (JK – 12)	1,656,051.00
K – 12 Adjustor	66,904.44

## 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**

**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 TITLE project for the Anishinabek Education System.

\$ \_\_\_\_\_ **Grand Total**

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

**Expected Payment Schedule**

<b>Deliverable</b>	<b>Date to be Completed</b>	<b>Value of Project Total</b>

**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 the TITLE project.
- 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/Individual, We/I 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 \_\_\_\_\_ 2023.

) \_\_\_\_\_  
 ) 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
<b>AES Fiscal Analysis</b>	Include detail as per Project deliverable			
	Include detail as per Project deliverable			
	Include detail as per Project deliverable			
	Include detail as per Project deliverable			
	Prepare Draft Report	Draft report for the KEB Board of Directors and Director of Education. Present to Board of Directors.		
	Prepare Final Report	Final Report Delivered to the KEB.		

**Additional Pricing - list details**

**Grand Total**

*(Matches Schedule A - Price)*