REQUEST FOR PROPOSAL

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Issue Date:</td>
<td>December 21, 2022</td>
</tr>
<tr>
<td>Deadline for Questions:</td>
<td>January 13, 2023</td>
</tr>
<tr>
<td>Date for Posting of Answers:</td>
<td>January 17, 2022</td>
</tr>
<tr>
<td>Deadline for Submission:</td>
<td>February 3, 2023</td>
</tr>
</tbody>
</table>

All bids must be submitted electronically to proposals@metisnation.org.

The Métis Nation of Ontario Secretariat (MNO) reserves the right to dismiss any or all bids at their sole discretion. The lowest proposal will not necessarily be accepted.
SCHEDULE A – INSTRUCTIONS TO BIDDERS

1.0 Bid Documents

1.1 The following documents form the basis of this bid process (the “bid documents”):
   a. Instructions to Bidders;
   b. Terms of Reference; and
   c. addenda issued during bidding period.

1.2 Check bid documents for completeness upon receipt. Inform the MNO immediately:
   a. should any documents be missed or incomplete; or
   b. upon finding any discrepancies or omissions.

1.3 Complete set of bid documents are available at MNO website page called Procurement Opportunities.

1.4 The bid documents are made available only for the purpose of submitting bids for the project. Availability and/or use of the bid documents do not confer a license or grant for any other purpose.

2.0 Amendments to Bid Documents

2.1 Questions in relation to this RFP shall be submitted via email to proposals@metisnation.org by the deadline in the schedule.

2.2 A bid shall be disqualified where contact is made with any person at the MNO other than the individuals outlined in the above.

2.3 The MNO shall not be responsible for instructions, clarifications or amendments communicated orally. Instructions, clarifications or amendments which affect the bid documents may only be made by addendum.

2.4 If bidders find discrepancies, omissions, errors, departures from codes or good practice, or points considered to be ambiguous or conflicting, they shall bring them to the attention of MNO as per 2.1 in writing, and not less than seven (7) business days before the bid closing dates, so the MNO may, if the MNO deems it necessary, issue instructions, clarifications, or amendments by addendum to all bidders prior to the bid closing date. The MNO will endeavor to issue such addenda at least seventy (72) hours prior to the bid closing.

3.0 Addendum/Addenda

3.1 Addendum/Addenda, if required, issued by the procurement officer, shall form part of the bid documents. Bidders shall acknowledge receipt of any addenda when submitting their bid. Bidders shall check a box for each
addendum/addenda and any applicable attachments that has been issued before a bidder can submit their bid submission online.

3.2 Addendum/Addenda will typically be issued via email, Seventy-Two (72) Hours prior to closing time and date.

3.3 In the event an addendum is issued within the seventy-two (72) hours prior to the closing time and date, it may include an extension of the closing time and date. It is the responsibility of the bidder to have received all Addendum/Addenda that have been issued. Bidders should check online at the MNO Procurement webpage.

3.4 The MNO encourages bidders not to submit their bid prior to Seventy-Two (72) hours before the bid closing time and date, in the event that an addendum is issued. If a bidder submits their bid prior to this, or at any time prior to the bid closing and an addendum/addenda is issued by the MNO, their bid submission shall WITHDRAWN and notified that their bid submission is considered INCOMPLETE (NOT accepted by the MNO) unless the bidder wants to resubmit by the deadline. The bidder is solely responsible for:

- making any required adjustment to their bid;
- acknowledging the addendum/addenda; and
- ensuring the re-submitted bid is RECEIVED by procurement officer no later than the bid closing date and Time.

4.0 Bid Completion

4.1 The MNO shall only accept and receive electronic bid submissions via email to proposals@metisnation.org.

5.0 Bid Submission & Withdrawal

5.1 Bidders are cautioned that the timing of the submission is based on when the bid is received, not when the bidder submitted, as transmission can be delayed in an “Internet Traffic Jam” due to file transfer size, transmission speed.

5.2 A bidder may edit or withdraw their bid submission prior to the closing time and date. However, the Bidder is solely responsible for ensuring the re-submitted bid is RECEIVED by MNO no later than the bid closing date and time (EST).

5.3 Bids will be irrevocable for a period of ninety (90) days from the date of submission after which period the bid expires.

6.0 Bid Opening and Evaluation
6.1 In the event that more than one bid is received from the same bidder, only the last bid received will be considered.

6.2 The MNO may reject the lowest or any bid or part of any bid, reject all bids or cancel this bid process in whole or in part.

6.3 The bid price offered will be considered the bidder’s “base bid”. The MNO reserves the right, but has no obligation, to adjust all bidders’ base bids by the amounts of any alternative prices which the MNO, in its discretion, decides to accept.

6.4 The MNO reserves the right to award the contract to the bidder that submitted the bid which, in the MNO’s sole discretion, provides the best value to the MNO based on the criteria described in the bid documents including, but not limited to, bidder’s:

- Base bid;
- Base bid, as adjusted by the MNO pursuant to the bid documents; and
- Clarification provided pursuant to the Section 8.0 (Requests for Clarification).

6.5 The MNO may accept or reject any regular, irregular, unbalanced, informal or non-compliant bids.

6.6 Incomplete or conditional bids may be declared non-compliant.

6.7 The MNO reserves the right to consider, during the evaluation of the bids:

- information provided in the bid itself;
- information provided in response to inquiries of credit and industry references set out in the bid;
- information received in response to enquiries made by the MNO of the third parties apart from those disclosed in the bid in relation to the reputation, reliability, experience and capabilities;
- the manner in which the bidder provides services to others;
- the experience and qualifications of the bidder’s senior management and project management;
- the compliance of the bidder with the MNO’s requirement and specifications; and
- innovative approaches proposed by the bidder in the bid.

6.8 The bidder acknowledges that the MNO may rely on the criteria which the MNO deems relevant, even though such criteria may not have been disclosed to the bidder. By submitting a bid, the bidder acknowledges the MNO’s rights under this section and absolutely waives any right, or cause of action, against the MNO and its consultants, by reason of the MNO’s failure to accept the bid submitted by the bidder, whether such right or cause of action arises in contract, negligence or otherwise.
6.9  The MNO reserves the right to open the bid and negotiate with a single bidder, in cases where only one bid is received, or to negotiate with a bidder of the MNO’s choice, if all bids are over budget or too high.

6.10 Should the MNO receive no compliant bids, the MNO, in its discretion, may re-bid the project or may negotiate a contract for the whole or in any part of the project with a bidder which has submitted a non-compliant bid.

6.11 In the event that two (2) or more compliant, equal bids are submitted during a competitive bid process, the MNO shall determine the successful bidder by drawing a bidder’s name, as determine by the CFO.

7.0  **Quotation Price**

7.1  The quotation provides that the prices shall be provided in numbers only.

7.2  A mathematical transposition discrepancy or error on the face of a quotation may be corrected by the MNO by correcting the quotation prices accordingly, unless otherwise decided by the MNO.

a. Where the discrepancy is in respect of a figure represented numerically and in words, the figure as written in words shall be accepted as correct, and the numerical representation will be corrected accordingly.

b. Where the discrepancy is in respect extensions of unit prices, the unit prices shall be taken as correct and the extension shall be corrected accordingly.

c. Where a mathematical error is made in adding line items to total, the corrected accordingly.

d. Where an error has been made in transferring an amount from one part of the quotation to another, the amount shown before transfer shall, subject to any corrections as provided for above be taken to be correct and the amount shown after the transfer and the quotation prices shall be corrected accordingly.

e. Where the discrepancy or errors is such that more than one of the foregoing provisions applies, the corrections shall be applied sequentially starting at (a).

7.3  Where the discrepancy or error is such that none of the foregoing provisions apply, the discrepancy or error shall be corrected by taking the lower of the inconsistent amounts as being correct, and the higher amount shall be corrected accordingly.

7.4  If a bidder has failed to enter a price for an item of work set out in the quotation document, the bidder has specifically stated otherwise in the quotation, be deemed to have allowed elsewhere in the quotation for the cost of carrying out the said item of work and, unless otherwise agreed to
by the MNO, no increase shall be made in the total discount price on account of such omission.

8.0 Requests for Clarification

8.1 The MNO may contact any one or more bidders to request clarification or further information without any obligation to contact other bidders. Such additional clarification shall be provided promptly by the bidder to the MNO. The MNO may, but is not obligated to, amend or revise the bid based on the clarification or further information.

8.2 Requests for information shall not be construed as acceptance of a bid.

9.0 Taxes

9.1 The Harmonized Sale Tax (HST) shall not be included in the bid price. All other eligible taxes shall be included in the bid price. Any taxes or increases to taxes announced prior to the date of the issuance of the bid documents, and schedules to come into effect subsequent to it, shall be taken to be included in the bid price.

10.0 Award of Contract, Execution of the Contract & Documents to be Delivered

10.1 Bidders shall not issue or make any statements or new releases concerning their bid, the bid process, the MNO’s evaluation of the bids, or the MNO’s award or cancellation of the bid process without the express written consent of the MNO.

10.2 Price commencing the work, the bidder shall deliver to the MNO:
   a. certified copies of the insurance required by the bid documents, and
   b. A current clearance certificate issued by the Workplace Safety and Insurance Board.

10.3 The bidder shall execute the contract and deliver the executed original to the MNO within ten (10) business days of award notification from the MNO.

10.4 The bidder agrees that the MNO shall not be deemed to be the employer of the bidder or its personnel under any circumstance whatsoever.

11.0 Liability

11.1 If a bidder breaches the bid contract, including by failing to execute the contract, for whatever reason, the bidder shall be liable to pay to the MNO, at the MNO’s elections as follows:
   a. the difference between the base bid prices of the breaching the bidder and the bidder who subsequently executes the contract; or
   b. the amount set out in the bid bond, and these amounts shall be considered liquidated damages, not a penalty, and the bidder hereby acknowledges that these amounts are a reasonable pre-
estimate of damages which will likely be suffered by the MNO should a breach of the bid contract occur. The MNO shall have the right to draw upon the bid bond should a breach of the bid contract occur, irrespective of any other terms of conditions set out in the bond.

11.2 A bidder, by submitting a bid, agrees that it will not claim damages, by any means, in respect to any matter relating to the contractor bidding process in excess of an amount equivalent to the reasonable costs incurred by the bidder in preparing its bid and waives any claim for loss of profits if no contract is made with the bidder.

12.0 Disputes – Process for Complaint Resolution

12.1 The following procedure shall apply to the conduct of complaint resolution by the MNO:

a. An unsuccessful bidder can request a meeting with the MNO Chief Financial Officer (CFO). Such a request will be in writing and shall (i) provide a detailed statement of legal and factual grounds of the protest, including copies of relevant documents, and (ii) identify the form of relief requested.

b. Where, after a meeting with the CFO, the bidder is satisfied that its concerns have been addressed and that the procurement process was conducted in a fair and equitable manner, no further action shall be required. Documentation in respect of the protest in question shall be maintained by the MNO for future reference.

c. Where, after the meeting between the bidder and the CFO, it is concluded that the procurement process was materially flawed, for any reason, the CFO shall issue a report to the MNO CEO/President for their approval recommending corrective action.

d. Where, after a meeting between the bidder and the CFO, the parties fail to achieve a mutually satisfactory resolution, the bidder may request an opportunity to present its case to the President, provided that the supplier’s request is in writing.

e. In the event of a dispute arising in connection with this bid process that cannot be resolved with the above complaint resolution process including, without limitation, a dispute concerning the existing of the bid contract, or a dispute as to whether the bid of any bidder was submitted on time or whether a bid is compliant, the MNO may refer the dispute to a confidential binding arbitration pursuant to the Arbitration Act, 1991, as amended, before a single arbitrator with knowledge of procurement/bidding law. In the event that the MNO refers the dispute to arbitration, the bidder agrees that it is
bound to arbitrate such a dispute with the MNO unless the MNO shall refer such a dispute to binding arbitration, there shall be no arbitration of such a dispute.

13.0 Claims of Litigation

13.1 The MNO shall not consider bids received from parties with whom the MNO is in litigation, or pending litigation, unless approval allowing such consideration is obtained by the bidder from the CFO of the MNO prior to close of bidding.

13.2 Bids which are not considered pursuant of the aforementioned policy shall be returned to the bidder and no contract in regard to the bid process shall have been created between the bidder and the MNO.

14.0 Representation & Warranty

14.1 The bidder represents and warrants that its bid is compliant with the terms set out in the bid documents. The bidder acknowledges that the MNO is relying on this representation and warranty. In the event that the bidder’s bid is accepted by the MNO and the bid is held by a court of competent jurisdiction to be non-compliant with the terms set out in the bid documents in a proceeding commenced by another bidder (the “Claimant”), the bidder will indemnify the MNO for any award of damages, howsoever characterized, that are payable to the Claimant as well as for the MNO’s actual legal expense, including all legal fees and disbursements as billed to the MNO.

15.0 Accessible Standards for Customer Service

15.1 Accessibility for Ontarians with Disabilities Act, 2005: In accordance with Accessibility for Ontarians with Disabilities Act, 2005, S.O. 2005, c.11, the MNO shall have regards for the accessibility for person with disabilities in respect to goods and services purchased by the MNO.

15.2 Ontario Regulation 429/07 (Accessible Standards for Customer Service): In accordance with section 6 of Ontario Regulation 429/07, Accessible Standards for Customer Service, the bidder is responsible for ensuring that all of its employees, volunteers and others and others outlined in the contract who deal with members of the public are adequately trained.

END OF SCHEDULE “A” – INSTRUCTIONS TO BIDDERS
1.0 Overview

Project Identification

Title: Regional Economic Sustainability Framework
Location: Across Ontario

2.0 Project Lead

This project will be led by the CFO or designate.

3.0 Introduction

In 1993, the Métis Nation of Ontario (MNO) was established through the will of Métis people and Métis communities coming together throughout Ontario to create a Métis-specific governance structure. Prior to 1993, Métis had been involved in pan-Indigenous lobby groups and organizations. The MNO was not created to represent all individuals and communities that claim to be Métis, but those individuals and communities that are a part of the Métis Nation.

At its original meetings, Métis representatives from communities throughout the province set out the foundational vision for the MNO. This vision is encapsulated in the MNO Statement of Prime Purpose.

The statement is a seminal document for the MNO and it sets out why the MNO was formed, who MNO represents, and what the MNO wants to achieve. The statement has been central to the MNO’s success for almost three decades.

The statement also affirms that the MNO was created to represent Métis people and communities in Ontario that are a part of the Métis Nation. Specifically, the document states:

“We, the Métis are a people of the lands which gave rise to our history and tradition and culture. We call these lands the Métis Homelands. The Homelands stretch from the lakes and rivers of Ontario; cross the wide prairies; traverse the mountains into British Columbia and into the far reaches of the Northwest Territories. They include the hills and valleys of the north-central American States. These are our lands. They are Métis lands. They are the lands of our past which nurture us today and which we value as the precious foundation of our future."

Some of the goals set out in the MNO Statement of Prime Purpose include:

- Creating a Métis-specific governance structure for the implementation of the nation’s inherent right to self-government in the province;
• Establishing a credible and recognized identification system for Métis people within the province;
• Focusing on ‘nation building’ through working together as a collective in order to support Métis citizens and communities;
• Pursuing a rights-based agenda and proudly asserting the Métis existence as a distinct Indigenous people within Ontario;
• Protecting and preserving the distinct culture and heritage of the Métis Nation in the province; and,
• Improving the social and economic well-being of Métis children, families and communities throughout the province.

MNO has built a province-wide governance structure which includes: an objectively verifiable, centralized registry of over 30,000 Métis citizens; approximately 31 Chartered Community Councils across the province which represent Métis citizens at the local level; a provincial governing body that is elected by ballot box every four years; an Annual General Assembly where regional and provincial Métis leaders are required to report back to Métis citizens yearly between elections; a charitable foundation which promotes and support Métis culture and heritage (Métis Nation of Ontario Cultural Commission); and an economic development arm (Métis Voyageur Development Fund).

In addition, the MNO has built an accountable, results-based provincial delivery structure to meet the socio-economic needs of its citizens and communities. Currently, the MNO delivers programs and services to its citizens through these branches: Healing and Wellness; Education and Training; Housing; Lands, Resources and Consultation; and Housing and Infrastructure. Through these various branches, the MNO maintains 30+ service delivery access points across the province, administers over $80 million annually and employs over 400 personnel across the province.

**Economic Development at the MNO**

The Statement of Prime Purpose, the founding document of the MNO, identifies developing “prosperity and economic self-sufficiency within the Métis Nation” as a key objective. In pursuit of this goal, the MNO, in 2008, adopted an economic development strategy, which includes the Policy on Local or Regional Allocations from the MNO’s Economic Development Structures.
Métis Voyageur Development Fund (MVDF): In 2010, flowing from the MNO-Ontario Framework Agreement, the MNO negotiated a MOU and 10 year, $30 million agreement with Ontario to provide equity and investment in Métis businesses supporting resource sector. The MVDF has achieved significant success since its inception.

Economic Development Law: In 2014, the MNO Annual General Assembly passed the Métis Nation of Ontario Prosperity and Self-Sufficiency Law, which sets out the legal framework for the MNO’s approach to economic development. As set out in Section 5 of the Prosperity Law:

“The goal of this Law is to enable the MNO to build a strong, stable and self-sustaining economic base upon which it can pursue, advance and achieve the objectives set out in its Statement of Prime Purpose as well as fulfill its roles and responsibilities to Métis citizens and communities for generations to come.”

The Prosperity and Self-Sufficiency Law establishes the legal framework for all of the MNO’s economic development activities. It describes the MNO Economic Development
Structures, which is the corporate structure that manages business activities in which the MNO has an interest.

Consistent with best practices in Aboriginal economic development (e.g., the Harvard Project), which emphasize separating politics from business, the Economic Development Structures have an independent board of directors and professional Chief Executive Officer. Following expert tax, legal and corporate advice, the Structures also allow the MNO to benefit from economic development while managing the legal and business risks involved in that activity.

Infinity Investments: In 2015, the Infinity Investments structures were completed, implementing the requirements of the Economic Development Law and organizing all of the MNO’s economic development activity so it can be managed by a professional, independent board of directors and Chief Executive Officer.

It is also important for the successful bidder to recognize the Truth and Reconciliation Commission (TRC) Calls to Action (#43, #47, & #92 identified below) that apply to Economic Reconciliation and identify where any of the recommended activities in the Framework respond to specific calls to action.
“43. We call upon federal, provincial, territorial, and municipal governments to fully adopt and implement the United Nations Declaration on the Rights of Indigenous Peoples as the framework for reconciliation.”

“47. We call upon federal, provincial, territorial, and municipal governments to repudiate concepts used to justify European sovereignty over Indigenous peoples and lands, such as the Doctrine of Discovery and terra nullius, and to reform those laws, government policies, and litigation strategies that continue to rely on such concepts.”

“92. We call upon the corporate sector in Canada to adopt the United Nations Declaration on the Rights of Indigenous Peoples as a reconciliation framework and to apply its principles, norms, and standards to corporate policy and core operational activities involving Indigenous peoples and their lands and resources.”

4.0 The Framework

4.1 Objective

The first objective of this RFP is to develop an MNO wide Economic Sustainability Framework and up to nine (9) five (5) year Regional Economic Sustainability Frameworks (the “Framework”) intended to support growth and opportunities for Métis citizens that are self-employed and/or own businesses. Participation is optional and determined by each region.

The second objective is to develop a draft MNO Prosperity Trust Distribution Policy that will incorporate finding from research completed developing the Economic Sustainability Framework.

4.2 Scope of Work

The Frameworks must be comprised of unique, locally tailored approaches for each of the participating regions for review and comment by MNO staff and respective Regional Councillor. Each Framework must include recommendations with the following content:

- a background report describing research, current situation, current economic analysis and profile of regional economies, issues, gaps, threats and challenges, strengths and opportunities;
- comprehensive economic development goals at the regional level;
• The table below shows the population size for each region as of October 31, 2022.

<table>
<thead>
<tr>
<th>Region</th>
<th>All Ages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Out of Province</td>
<td>869</td>
</tr>
<tr>
<td>Region 1</td>
<td>3209</td>
</tr>
<tr>
<td>Region 2</td>
<td>1667</td>
</tr>
<tr>
<td>Region 3</td>
<td>1596</td>
</tr>
<tr>
<td>Region 4</td>
<td>1975</td>
</tr>
<tr>
<td>Region 5</td>
<td>3558</td>
</tr>
<tr>
<td>Region 6</td>
<td>3338</td>
</tr>
<tr>
<td>Region 7</td>
<td>6735</td>
</tr>
<tr>
<td>Region 8</td>
<td>3264</td>
</tr>
<tr>
<td>Region 9</td>
<td>3956</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>30167</strong></td>
</tr>
</tbody>
</table>

• input from Métis Voyageur Development Fund and Infinity Investments
• input and requirements of Métis communities, respective Métis-owned businesses and other stakeholders from each region to capitalize on current and emerging opportunities; and
• clearly articulated implementation costs and timelines.

Any proposal that does not meet the requirements of the Terms of Reference will not be considered for award.

The proposal will include, but is not limited to the following requirements:

**4.2.1 Phase 1: Research and Draft Economic Sustainability Frameworks**

*Research Phase*

1) A review and analysis of existing MNO reports and plans, including but not limited to:
   a. [MNO Statement of Prime Purpose](#)
   b. [MNO Economic Development Strategy](#)
   c. [Policy on Local or Regional Allocations from the MNO’s Economic Development Structures](#)
   d. [Métis Voyageur Development Fund](#)
   e. Ontario Métis Business Directory
   f. [Infinity Investment Structures](#)
   g. [Métis National Council (MNC) Economic Development Strategy](#)
   h. Métis Micro-Business Fund

2) Support Métis owned businesses

3) A situational analysis to assess the opportunities and challenges based on the existing environment in each region, including a review of recent trends;

4) Specific needs of communities in the regions;

5) Research IBAs and analyze how they can support Métis businesses
6) the identification of strengths, weaknesses, opportunities and threats (SWOT) as part of the situational analysis;
7) review and analysis of MNO laws, policies, and processes to provide recommendations on making adjustments, where necessary and appropriate, to support sustainable economic growth and diversification;
8) preparation of a background report describing research, current situation, current economic analysis and profile of the local and regional economy, issues, gaps, threats and challenges, strengths and opportunities for review and comment by MNO staff and Regional Councillors, and include an asset-based investor profile for business attraction; and
9) preparation of province wide MNO Economic Sustainability Framework that incorporates all regional frameworks.

4.2.2 Phase 2: Consultations and Final Frameworks

The successful bidder will conduct in-depth consultation with a wide range of stakeholders, including Community Councils by Region, Métis-owned businesses and citizens, for input on the draft Frameworks prior to the final report. The successful bidder will work with the MNO to create an innovative public engagement plan utilizing both traditional and non-traditional outreach methods to encourage participation from citizens. The successful bidder should keep in mind survey fatigue and complete as much research as possible prior to consultation to ensure efficient and meaningful consultation. Examples include community surveys, online forums, focus groups, mind mapping workshops, interviews, community workshops, or other innovative approaches. The engagement plan will need to be flexible with up to 3 options that the MNO and Regional Councillors can choose from. The successful bidder will work with MNO staff and Regional Councillors to schedule consultation activities.

The successful bidder is responsible for all invitations, confirmations, set up, facilitation, supplies, booking, advertising, transcribing and clean-up of consultation sessions, unless otherwise agreed upon by the project lead. Advertising through the traditional and social media channels of the MNO is possible, and in this case, this advertising will be provided to the MNO by the successful bidder.

Upon completion of consultations, the successful bidder will draft a final version of the Framework to be reviewed and approved by the Regional Councillor and Community Councils in each region. Moreover, a province wide Economic Sustainability Framework will be developed and presented to Provisional Council of the Métis Nation of Ontario.

Each Framework must include recommendations with the following content:

- a background report describing research, current situation, current economic analysis and profile of regional economies, issues, gaps, threats and challenges, strengths and opportunities;
- comprehensive economic development goals at the regional level;
• input from Métis Voyageur Development Fund and Infinity Investments
• input and requirements of Métis communities, respective Métis-owned businesses and other stakeholders from each region to capitalize on current and emerging opportunities; and
• clearly articulated implementation costs and timelines.
• develop up to nine Economic Sustainability Frameworks that contains economic development goals, objectives and performance measures unique to each region. The successful bidder must consider current strategic goals, opportunities and threats, external conditions and economic players and partners. The Frameworks will contain an implementation plan, outlining a prioritization of short-term and long-term activities and the timing, anticipated cost, funding source and lead or “champion” of each implementation action. Also, it will include economic development initiatives that build on existing economy, culture, history and supporting existing businesses and potential employment opportunities. These efforts will create an economic environment that is conducive to attracting, expanding and retaining current, new and diverse businesses that will create employment and generate wealth for MNO citizens and strengthen the economic base of the communities in the MNO regions, contributing to sustainable prosperity for MNO citizens.
• In creating each Economic Sustainability Framework, it is important to communicate and work with the communities and Métis-owned businesses within each region, involving them in the strategic process so that they have a better understanding of the challenges and the opportunities presented by economic development for their businesses and employment opportunities. Furthermore, the bid should include consultations with associated organizations that are involved in economic development initiatives such as the Métis Voyageur Development Fund and Infinity investments.

4.2.3 Phase 3: Draft Prosperity Trust Distribution Policy

Develop a Prosperity Trust Distribution Policy. The MNO Prosperity Trust was established with $27.5 million from the May 7, 2018 signed contribution agreement with the Ministry of Energy. The intention of the funds is to develop prosperity and economic self-sufficiency and create long-term wealth for MNO communities and citizens. The Trust Deed allows the excess of investment returns, when it occurs, to be distributed towards activities that support prosperity, economic self-sufficient and long-term wealth. The MNO is looking for assistance in developing a Prosperity Trust Distribution Policy that will guide allocations, if it occurs. Feedback from Métis citizens and businesses will be key in developing a Prosperity Trust Distribution Policy.

1) A review and analysis of existing MNO reports and plans, including but not limited to:
   a. The Métis Nation of Ontario Prosperity Trust
   b. MNO Statement of Prime Purpose
   c. MNO Economic Development Strategy
d. Policy on Local or Regional Allocations from the MNO’s Economic Development Structures

e. Métis Voyageur Development Fund

f. Infinity Investment Structures

2) preparation of a draft Prosperity Trust Distribution Policy for review and comment in the consultation phase;

3) present, including charts, diagrams and visual representations designed to communicate information effectively the draft Prosperity Trust Distribution Policy to Provisional Council of Métis Nation of Ontario (PCMNO); and

4) present at the Annual General Assembly in 2023 for final adoption of the Prosperity Trust Distribution Policy.

4.2.4 Phase 4: Information Dissemination

For participating regions, the successful bidder will engage with Regional Councillors and associated Community Councils to present and discuss implementation of the Framework, especially as it pertains to their corresponding region. This will necessitate the creation of a PowerPoint presentation(s), including charts, diagrams and visual representations designed to communicate information effectively.

The successful bidder will work with the MNO and Regional Councillors to plan and coordinate this phase to ensure comprehensive and efficient engagement. Furthermore, once completed, the MNO Economic Sustainability Framework will be presented to the Economic Development Working seeking a recommendation to be presented to PCMNO.

5.0 Deliverables

Expected outcomes include, but are not limited to:

1) preparation of a Prosperity Trust Distribution Policy and overall Framework for review and comment by Economic Development Working Group and PCMNO;

2) preparation of a background report describing research, current situation, current economic analysis and profile of the local and regional economy, issues, gaps, threats and challenges, strengths and opportunities for review and comment by participating Regional Councillors;

3) an analysis of the relevant observations and findings from the Consultation Phase.

4) the identification of common themes, strategic directions and key drivers for all nine regions to position the economic bases of Métis communities within the regions;

5) the identification of key economic opportunities for joint economic development initiatives and potential economic drivers that can be implemented in the short to medium-term;

6) strategies to develop stronger economic connections between Métis and non-Métis communities;
7) identification of appropriate business and investment attraction target industries and sectors, and strategies for attracting investment from them;
8) Up to nine (9) Economic Sustainability Frameworks containing economic development action plans with a vision, objectives, suggested activities, projects and programs to implement objectives and goals set forth in the Frameworks as well as performance measures with timelines to evaluate whether and to what extent plan goals and objectives have been or are being met;
9) options and recommendations to the MNO and Regional Councillors for moving forward in the implementation stage;
10) presentation of the final Frameworks, via a PowerPoint presentation and corresponding visual representations, to Métis Community Councils in each region in the form of one-day workshops to be designed by the consultant;
11) presentation to PCMNO of the MNO Economic Sustainability Framework encompassing all nine regions; and
12) Up to nine (9) final frameworks to be completed by Fall 2023.

6.0 Project Oversight

MNO staff will provide administrative support of the process. Regional Councillors and the communities within their region will provide input into development of each Framework. MNO staff will also facilitate regular input, review and approval by communities in each region.

The successful bidder’s work is to be conducted in close collaboration with Regional Councillors and MNO staff. The successful bidder will be expected to attend project meetings as required and provide a brief update on the status of the Framework and seek information and/or advice from the project lead and Regional Councillors.

7.0 Credentials and References

Include a description of the bidder’s history and experience, particularly as related to knowledge and connection with economic development activities in the respective areas. Provide 2 or 3 examples of your experience undertaking similar work.

Your proposal should include references (at least three) from previous clients for whom you have conducted similar/comparable work including specific contacts and phone numbers and sample economic development plans.

8.0 Timeframe and Schedule

The bidder must include a schedule in the proposal that captures the scope of work, deliverables and timeline, with a start date of mid-January 2023 and final delivery of June 2023.

The presentation to Community Councils will be scheduled at the appropriate time as determined by the project lead.
9.0 **Fees and Disbursements**

Proposals must indicate the following:

- disbursements;
- monthly fees and linking of these fees to the completion of tasks as per the proposed schedule;
- hours per task and hourly rates;
- upset limit and how additional hours will be charged (rates); and
- team members who will be assigned to the project for the duration of the project and any substitutes in the event of staff changes.

The fees must be provided in the following format:

<table>
<thead>
<tr>
<th>Itemized Project List</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Region 1</td>
<td></td>
</tr>
<tr>
<td>Region 2</td>
<td></td>
</tr>
<tr>
<td>Region 3</td>
<td></td>
</tr>
<tr>
<td>Region 4</td>
<td></td>
</tr>
<tr>
<td>Region 5</td>
<td></td>
</tr>
<tr>
<td>Region 6</td>
<td></td>
</tr>
<tr>
<td>Region 7</td>
<td></td>
</tr>
<tr>
<td>Region 8</td>
<td></td>
</tr>
<tr>
<td>Region 9</td>
<td></td>
</tr>
<tr>
<td>MNO Economic Sustainability Framework</td>
<td></td>
</tr>
<tr>
<td>Prosperity Trust Distribution Policy</td>
<td></td>
</tr>
<tr>
<td><strong>Grant Total</strong></td>
<td></td>
</tr>
</tbody>
</table>
**Point Rated Requirements** – Please identify how your proposal meets the below criteria:

1. **Project Team (20%)**
   
   This section should include all team members and should detail their qualifications and roles in this project.

2. **Relevant Experience (20%)**
   
   This section should describe the number of previous economic development plans created and describe previous relevant experience of specific project team members. The experience may be supported with project description(s) and examples submitted.

3. **Past Performance (15%)**
   
   Points will be awarded based on the bidder’s past experience and performance working with municipalities and Indigenous communities.

4. **Methodology (30%)**
   
   The consultant should detail the proposed methodology to achieve the project objectives. The consultant should demonstrate a clear understanding of the work involved by addressing the following factors: objectives, client input, meetings, schedules, budget, concerns, significant events or activities.

5. **Project Schedule (10%)**
   
   It is anticipated that the work will be awarded to the successful bidder in January 2023 and the Framework will be completed by June 2023.

6. **Fees (5%)**
   
   The consultant shall submit a proposal based on a time fee basis which shall include estimates of proposed hours of work, rates, and expenses. The allocated budget for this project is limited to $50,000 for the Prosperity Trust Distribution Policy and $130,000.00 for the final Economic Sustainability Framework.

Proposals will be evaluated and ranked according to the outline below. The evaluation will be based on a 0 to 10 scale. The score of each criterion will be determined by multiplying the criteria weight by the rating. The sum of all scores will be the total score.

<table>
<thead>
<tr>
<th>Rating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>9-10</td>
<td>Exceeds expectations: Bidder clearly understands the requirements, excellent probability of success.</td>
</tr>
<tr>
<td>7-8</td>
<td>Somewhat exceeds expectations: Bidder has a very good understanding of the requirements, very good probability of success.</td>
</tr>
<tr>
<td>5-6</td>
<td>Meets expectations: Bidder has a good understanding of requirement, good probability of success.</td>
</tr>
<tr>
<td>Score</td>
<td>Description</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
</tr>
<tr>
<td>3-4</td>
<td>Somewhat meets expectations: Bidder understands the requirements, minor weakness or deficiencies, fair probability of success.</td>
</tr>
<tr>
<td>1-2</td>
<td>Does not meet expectations: Bidder does not demonstrate understanding of the requirements, low probability of success.</td>
</tr>
<tr>
<td>0</td>
<td>Lack of response or complete misunderstanding of the requirements, no probability of success.</td>
</tr>
</tbody>
</table>

The MNO reserves the exclusive right to determine the qualitative aspects of all proposals relative to the evaluation criteria.

Any proposal that does not meet the requirements of the Terms of Reference will not be considered for award.