



Canada Council  
for the Arts

Conseil des arts  
du Canada

**Collecting Demographic Data**  
**REQUEST FOR PROPOSAL**

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# THE CANADA COUNCIL FOR THE ARTS

## Collecting Demographic Data

### REQUEST FOR PROPOSAL

#### 1.0 GENERAL INFORMATION & INSTRUCTIONS

##### 1.1 PURPOSE FOR THE RFP

This request for proposal (RFP) invites individual consultants, consulting firms or teams of researchers (the Firm) with expertise in the collection and analysis of workforce demographic data to submit proposals to provide research services to the Canada Council for the Arts (the Council). The Council wishes to develop and pilot an online survey to track the demographic makeup of the arts organizations that receive core funding.

##### 1.2 ABOUT THE CANADA COUNCIL FOR THE ARTS

The Canada Council for the Arts is Canada's national public arts funder, with a mandate "to foster and promote the study and enjoyment of, and the production of works in, the arts."

The Council champions and invests in artistic excellence through a broad range of grants, services, prizes and payments to professional Canadian artists and arts organizations. Its work ensures that excellent, vibrant and diverse art and literature engages Canadians, enriches their communities and reaches markets around the world.

The Council also raises public awareness and appreciation of the arts through its communications, research and arts promotion activities. It is responsible for the Canadian Commission for UNESCO which promotes the values and programs of UNESCO in Canada to contribute to a more peaceful, equitable and sustainable future. The Canada Council Art Bank operates art rental programs and helps further public engagement with contemporary arts.

The Council is governed by an 11-member Board. Members of the Board and the Director/CEO are appointed by the Governor in Council. The Council works closely with federal, provincial, territorial and municipal arts and cultural agencies and departments.

A federal Crown corporation created through an Act of Parliament in 1957, the Council reports to Parliament through the Minister of Canadian Heritage and Official Languages. It receives funding from Parliament and its annual budget is supplemented by endowment income, donations and bequests.

For more information in regards to the above-mentioned, please refer to Council's following websites:

- Canada Council for the Arts: <http://canadacouncil.ca/>
- Public Lending Right Program: <http://www.plr-dpp.ca/>
- Art Bank: <http://artbank.ca/>
- CCUNESCO: <http://unesco.ca/>

### 1.3 BACKGROUND

The Council wishes to develop and pilot an online survey to track the demographic makeup of the workforce and boards of organizations that receive core funding. This would include quantitative data on gender, age, cultural diversity, Indigenous, Official Languages, Official Languages Minority Communities, disability, age etc. The survey will be completed by the employees and Board of the organizations, not by the organizations themselves. **This RFP is for a pilot survey with a small cohort of organizations that will be inform future decisions about grant conditions.**

### 1.4 ACCEPTANCE OR REJECTION OF PROPOSALS

It is the intention of the Council to consider the proposals submitted and to not be precluded from negotiating with one, or more than one, of the parties responding to this RFP to finalize technical and commercial terms. **The Council reserves the right to accept any proposal, or any part of a proposal submitted that is deemed, in the sole discretion of the Council, to be the most advantageous to it.**

The proposal having the lowest cost shall not necessarily be accepted and the Council may take into account any criteria in evaluating responses to this RFP. The Council is not obliged to provide reasons to any responding parties with respect to any use of the Council's discretion.

The Council reserves the right, in its sole discretion, to seek further information from, or clarification of, any proposal submitted in response to this RFP, and is entitled to utilize any such information or clarifications received in deciding which proposal it may accept, if at all.

### 1.5 RFP DATES & DEADLINES

The following schedule will be followed for this RFP:

RFP posted to MERX	March 28, 2018
Deadline for questions regarding the RFP	April 13, 2018
Deadline for submissions	April 27, 2018
Presentations or additional requests from short-listed Firm(s) if required	May 1-5, 2018
Contract negotiations	May 7-11, 2018
Start of contract	May 21, 2018

**Period of Validity of the Proposal:** Proposals submitted must remain open for acceptance by the Council for a period of not less than sixty (60) days from the specified closing date.

### 1.6 CONFIDENTIALITY AND COUNCIL'S OBLIGATION

All information, including the RFP, provided to the Firms shall remain the exclusive property of the Council. As such, all data and information shall be kept strictly confidential and shall not be disclosed to any third party without the express written consent of the Council.

The issuance of this RFP and Council's receipt of any proposal shall not, in any manner, obligate Council to perform any act, incur any liabilities, or reimburse or compensate any Firm for preparation costs or other losses incurred in the preparation of their response to this RFP. Council shall have the right to use,

for any purpose, any information submitted in connection with the RFP unless it has been marked Confidential.

Confidentiality agreements or clauses are subject to the [Access to Information Act](#) s. 20(1)(b) and must meet the following four conditions to be treated confidentially.

The information must be:

1. financial, commercial, scientific or technical information;
2. “confidential” - three indicators of confidentiality:
  - the information contained in the record is not available from other sources in the public domain or obtainable by observation or independent study by a member of the public acting on his or her own;
  - the circumstances in which the information originates and is communicated give rise to a reasonable expectation that it will not be disclosed; and
  - the information, whether provided by law or supplied voluntarily, is communicated to the government within a relationship that is either fiduciary or not contrary to the public interest and that will be fostered for the public benefit by confidential communication.;
3. supplied to a government institution by a third party; and
4. treated consistently in a confidential manner by the third party.

## 1.7 TERMS & CONDITIONS

Successful firm(s) will be required to enter into a Contract with the Council which will embody the terms of this RFP and any subsequent negotiations or clarifications. The Council reserves the right to modify or amend this form of agreement prior to its finalization and execution with the party submitting the successful proposal.

## 1.8 REQUESTS FOR INFORMATION

Please submit any questions in writing, via email, to the contact below and the Council will respond accordingly. To ensure that all firms receive equivalent information, the Council will post applicable clarification questions and responses on MERX. Deadline for submitting questions is April 13, 2018 at 5:00 pm EST (Ottawa local time).

Enquiries concerning any aspect of this RFP can be directed to:

**Contact Name:** Alexis Andrew

**Contact Title:** Director, Research, Evaluation and Performance Measurement Section

**Email:** alexis.andrew@canadacouncil.ca

## 1.9 INSTRUCTIONS

### 1.9.1 INTENTION TO REPLY TO RFP

Please reply via email (address in section 1.8) that you have reviewed this RFP and of your intention to submit a proposal by April 16, 2018 . A return email address must be shown in the proposal.

#### 1.9.2 RECEIPT OF PROPOSAL

The completed RFP submission shall be received electronically by email on the proposal due date of April 27, 2018 by 5:00 pm EST (Ottawa local time). Firms are requested to keep their RFP submission size to under 20 MB. Please indicate the RFP title in the email's subject line.

All proposals must be:

- 1) signed by a duly authorized officer;
- 2) include a statement that the firm has examined and understood the RFP and all addenda (as applicable), and
- 3) state that the Firm has the technical and financial resources and personnel to provide the services as identified in this RFP, and within the timeframes specified in this proposal.

Consulting firms are responsible for ensuring that submissions are received by the Council prior to the proposal due date and time. Late submissions received after the closing date and time will be disqualified from competition and not evaluated.

#### 1.9.3 FORMS OF PROPOSAL

To ensure that all proposals are uniformly evaluated, they must be submitted in the format prescribed in Appendix A of this RFP.

The proposal should completely address each element of the Council's requirements as outlined in Section 2.2 (Service Requirements). Changes or enhancements should be clearly identified and explained. The Firm may suggest alternative means beyond the scope of the stated requirements.

All the terms and conditions set forth in the RFP are accepted and incorporated in the proposal unless the proposal specifically takes exception to them.

#### 1.9.4 MODIFICATION OF PROPOSALS

Firms may modify their proposals up to the specified closing date and time.

#### 1.9.5 AMENDMENTS OR WITHDRAWAL OF THE RFP

Correction or clarification to the RFP will be issued in the form of a written addendum to the RFP and will be posted on MERX. No interpretation, correction, clarification or amendment to the RFP shall be binding on the Council unless it is by way of an addendum. Firms must acknowledge receipt of all addenda in their proposal.

#### 1.9.6 RETURN OF PROPOSALS

Unsuccessful proposals will not be returned to the Firm.

## 2.0 COUNCIL'S REQUIREMENTS

### 2.1 OVERVIEW

The Council wishes to develop and pilot an online survey to track the demographic makeup of the employees and Boards of organizations that receive core funding. The Council is looking for an external Firm to develop an online survey for employees of organizations receiving Council's core funding to fill out voluntarily.

The Firm would:

- Look at existing surveys (Canadian and international) that collect demographic data from the arts and other selected sectors, and provides recommendations on best practices;
- Design a questionnaire in consultation with the Council and a sample of Council's core clients;
- Work with the Council and core clients to pilot the bilingual questionnaire; and
- Analyze the results and provide recommendations for the sharing of data and implementation of a permanent tool.

The survey will be completed by the employees and Board of the organizations, not by the organizations themselves. This is a pilot survey with a small cohort of organizations that will be inform future decisions about grant conditions.

The following elements are out of scope for the current RFP: analysis of artistic programming and audience demographics.

Objectives:

- The Council obtains greater understanding of how to collect workforce demographic data in order to implement ongoing data collection for performance measurement; and,
- The arts community is engaged in the development of a measurement tool that supports and empowers them in their efforts to build diversity in their workforces.

The present project has a maximum budget between \$60,000 and \$75,000.

The successful firm will be selected in accordance with a cost-benefit analysis of the submitted proposal, considering factors that may include but are not limited to: the firm's experience, proposed methodology, value-added, reputation, customer service, and the creativity of the proposal when recommending additional methods or research techniques for accomplishing the research objectives of this study.

### 2.2 SERVICE REQUIREMENTS

The Firm shall:

- Deliver a report on existing surveys (both Canadian and international) that collect demographic workforce data from the arts and other selected sectors, that provides recommendations on best practices in methodology and reporting mechanisms;
- Develop an online survey, in consultation with Council and a small group of core grant recipients;
- Pilot a bilingual online survey with a sample of core grant recipients (up to 25 organizations with workforces of approximately 60 FTEs on average; and,
- Deliver a final report that includes:
  - an assessment of the pilot survey;
  - analysis of the data, according to multiple variables; and,
  - recommendations for the sharing of data and implementation of a permanent survey.

Methodology:



Agencies will be requested to outline their recommended methodologies in the proposal.

### 2.3 GENERAL TIMEFRAME REQUIREMENTS

Exact timelines will be defined with the successful Firm. However, the following general timeframes are being planned as follows:

May 2018 - Contact is signed and work begins

May 2018 - Kick-off meeting with Project Authority

June 2018 - Review of existing surveys and best practices in methodology and reporting mechanisms

July 2018 - Consultations and development of online survey

August/September 2018 - Test survey

October/November - Pilot survey

December/January 2019 - Assessment of survey and analysis of data

February 2019 - Final report delivered with recommendations.

### 2.4 OTHER REQUIREMENTS

There are no other requirements.

## 3.0 EVALUATION OF THE PROPOSALS

### 3.1 SCORING

All proposals will be rated on the basis of a "points earned" matrix that will involve an analysis of the complete proposal including, but not limited to, such areas as:

- Proposal is submitted according to instructions (Pass/Fail)
- Firm's capability (70%)
  - o [Section A: Executive Summary of the Proposal](#)
  - o [Section B: Profile of the Firm](#)
  - o [Section C: Suitability of the Firm](#)
  - o [Section D: Service Requirements](#)
  - o [Section E: Service Standards](#)
  - o [Section F: References](#)
  - o [Section G: Timeline Requirements](#)
- Firm's pricing schedule (30%)
  - o [Section H: Pricing Schedule, Experience & Value Added](#)
  - o [Appendix B](#)

Firms are required to demonstrate in their proposal that they are able to satisfy the above criteria.

Council reserves the right in its sole discretion to request, in writing or orally, clarification of any additional information concerning proposals that are considered responsive.

### 3.2 SHORT-LIST

A short-list of Firms will be selected on the basis of Council's analysis. Firms on the short-list will be notified in writing and Council reserves the right to request a one-hour presentation to the Council's Selection Committee.

The Council retains complete discretion in deciding which proposals meet the requirements set out in the RFP and what evidence will be considered adequate to indicate compliance with those requirements.

### 3.3 AGREEMENTS WITH SUCCESSFUL FIRMS

The Council shall enter into negotiations with the successful Firm(s) with a view to finalizing a Contract for services (the contract), on terms acceptable to the Council. The contract shall be for a period of **12 months** in favour of the Council. The Council reserves the right to cancel the contract at any time if the service does not meet Council's expectations and a 30-day advance notice will be sent.

If an agreement acceptable to the Council is not reached within sixty (60) days after selection of the successful Firm, the Council may disqualify that Firm and re-evaluate the remaining proposals without obligation or claim against the Council.

All proponents will be advised on the results of the RFP, including disclosure of the name of the winning proponent, once the proposals have been reviewed and the final negotiations with the winning proponent have been finalized and agreed. Notifications will be done via an email and/or telephone conversation with all the proponents at the discretion of the Council. Within 15 days after notification of award, unsuccessful proponents may request a debriefing on their proposal to be scheduled at a later date.

## 4.0 WORK TERMS

### 4.1 TASKS

Specific tasks, activities, deliverables, and research timelines or milestones will be determined by the Project Authority during negotiation of the contract. The Project Authority will negotiate with the Firm the level of effort (number days), nature and/or scope of each task.

Work will include, but is not limited to:

- A report on existing surveys collecting demographic workforce data that examines best practices in methodology and reporting mechanisms;
- Development of an online bilingual survey, with primarily closed questions and a small number of open-ended questions, in consultation with the Council and a small group of core grant recipients;
- Pilot of the survey tool with a sample of core grant recipients; and,
- A final report that includes an assessment of the pilot survey, an analysis of the data, according to multiple variables and recommendations for the sharing of data and implementation of a permanent tool.

A presentation on the findings of the report may be requested and should be included as optional in the budget.

### 4.2 CLIENT SUPPORT

The Council's Project Authority will:

- Provide overall project management authority;
- Provide the Firm with background documents for review;
- Assist the Firm with obtaining Council documents and data, when required;
- Will be the source of final approval and acceptance of all deliverables; and
- Provide feedback to the Firm on all deliverables.

### 4.3 DELIVERABLES AND ASSOCIATED SCHEDULE

Deliverables include:

May 2018 - Contact is signed

June 2018 – Report on review of existing surveys, best practices and reporting mechanisms

August 2018 – Delivery of final survey tool

November 2018 – Interim report of survey results

December 2018 – A final report that includes an executive summary, an assessment of the pilot survey, a detailed analysis of responses with cross-tabulations according to multiple variables and recommendations for the sharing of data and implementation of a permanent tool. Appendices should include: the full technical report; banner tables; the raw survey data in .csv or excel; the survey coding interpretation and survey dictionary; and the methodology used to analyze the data from the survey (type of statistics and approach).

### 4.4 OFFICIAL LANGUAGES

Work, including tasks and deliverables, may be completed in either official language; however the Firm must be capable of providing services in both official languages, especially for conducting meetings and reviewing literature and reviewing survey responses.

#### 4.5 **WORK LOCATION**

The Firm will be able to work from its premises. The work shall be carried out primarily via email and teleconference with meetings and consultations conducted as required in the offices of the Project Authority.

#### 4.6 **TRAVEL**

No travel outside the NCR will be required. Travel within the NCR will not be reimbursed. Travel-related expenses will be paid and are to be included in the proposed budget.

## APPENDIX A - PROPOSAL FORMAT

To ensure that all proposals are evaluated equally, the submissions must be divided into the following sections:

### SECTION A AN EXECUTIVE SUMMARY OF THE PROPOSAL

### SECTION B A PROFILE OF THE FIRM

This section should include:

- company legal name and Canadian address;
- contact information for person responsible for RFP submission;
  - Name, Title, Phone, E-mail
  - Authorized Signature and Date
- website;
- professional memberships;
- number of years in business as an research and analysis firm in Canada;
- number of core customers;
- financial capacity;
- geographical area of operation;
- a brief description of your company, including the number of FTEs (employees versus contract personnel), average length of employment, an organizational chart and a brief resume of each senior manager.
  - Provide details that would be specific to this engagement

### SECTION C SUITABILITY OF YOUR FIRM

This section should describe in one page why you feel that the Firm is best suited to serve the Council's research requirements.

Please describe what work the Firm has done in terms of the collection and analysis of workforce demographic data, or other with (a) Crown corporation(s), or (b) similar type of agencies and/or organizations, and (c) with organizations working in the arts and culture sector. A demonstrated knowledge and understanding of the arts and culture sector will be a bonus.

The Firm must be able to demonstrate experience in providing 2 services for similar corporations and agencies and should demonstrate both Canadian and Global reach.

### SECTION D SERVICE REQUIREMENTS

This section should be broken into sub-sections that respond to each of the requirements identified in the [Council's Service Requirements](#) (2.2) of this RFP. The Firm must detail their proposed methodology which should include:

- a preliminary list of resources for the review of existing surveys and a plan for sourcing additional resources;
- a methodology for developing the survey, including consultations with the sample organizations and pre-testing;

- justification of which online survey tool will be used and how it meets the Council's requirements in terms of accessibility, Official Languages and industry standards;
- a framework for analyzing the results including identification of sample variables; and
- an outline of the final report.

The Firm must provide project summaries describing at least two (2) engagements related to the requirements of this RFP completed in the past three (5) years and must show experience and qualifications with similar corporations and agencies. The Firm must demonstrate qualifications for each of the requirements and articulate what value they brought to their client through the delivery of that service. The Firm must demonstrate experience in providing quantitative and qualitative research in the collection and analysis of demographic data.

#### SECTION E      **SERVICE STANDARDS**

This section should describe the Firm's approach, methodology and accelerators for managing and delivering on project engagements of this nature (based on the examples identified in [Section D](#)).

This section should also address the following:

- Firm's ability to provide a highly personalized, responsive and practical service, and meet established project deadlines;
- Firm's proposal for problem resolution if the proposed work is unsatisfactory;
- Firm's ability to provide a high level of service to Council in both official languages.

#### SECTION F      **REFERENCES**

Please provide three references of comparable, existing corporate clients including the names of the senior contacts, phone number and email. Summarize the work that was done for their organization and the year(s) the service was provided. At a minimum, one of these references must come from Government of Canada departments, agencies or Crown Corporations. Private sector references may also be provided in addition, if desired.

#### SECTION G      **TIMELINE REQUIREMENTS**

This section should describe the Firm's ability to meet the timeframes indicated in [Section 2.3](#) and demonstrate availability and capacity to deliver on the Council's service requirements in the timeframe requested.

#### SECTION H      **PRICING SCHEDULE, RESOURCES & VALUE ADDED**

This section should state the total value of the contract and outline the rates for services for each resource category (see [Appendix B](#) for the roles). Resumes must be provided for each of the roles to demonstrate the Firm's breadth of experience and availability of these resources to immediately start work on the proposed requirements.

Indicate whether your Firm would provide thresholds for pricing influenced by spending or if any additional incentives such as early payment terms or grouped project discounts could apply.

Describe any other value added services that your Firm could provide. Explain where there would be any additional financial advantage if your Firm was awarded work.

**APPENDIX B – PRICING SCHEDULE, RESOURCES & VALUE ADDED**

As a requirement to complete the Proposal, a pricing schedule must be included.

**B.1 PRICING SCHEDULE**

To ensure that all proposals are evaluated equally, please provide a rate for each of the roles identified below:

**Fee Schedule**

	<b>\$/Hour</b>	<b>Daily Rate</b>
<b>Role</b>		
<b>Role</b>		
<b>Role</b>		
<b>Role</b>		
<b>Role</b>		
<b>Role</b>		
<b>Role</b>		
<b>Role</b>		
<b>Role</b>		
<b>Role</b>		
<b>Role</b>		
<b>Role</b>		

**Note:** If additional roles would be required to provide the services requested by the Council, list the role, rate and provide a description of the expected need for that type of resource.

**B.2 KNOWLEDGE, EXPERIENCE AND CAPABILITY**

It is important to the Council to have competent resources who have been dedicated by their Firm to work with the Council. Describe the resources, including their knowledge, qualifications and experience to provide the services required by the Council. Please provide resumes for each of the roles identified above.

**B.3 VALUE ADDED**

Indicate whether your Firm would provide thresholds for pricing influenced by spending or if any additional incentives such as early payment terms or grouped project discounts could apply.

Describe any other value added services that your Firm could provide. Explain where there would be any additional financial advantage if your Firm was awarded work.