



Canada Council
for the Arts

Conseil des arts
du Canada

Standing Offer – Request for Proposals:

**CADAC Services (Canadian Arts Data / Données sur les arts au
Canada)**

Research Measurement and Data Analytics (RMDA)

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A. STANDING OFFER: PROFESSIONAL RESEARCH SERVICES AND EXPERTISE FOR THE CANADA COUNCIL FOR THE ARTS

General Provisions

The purpose of this Standing Offer (SO) is to add Canadian suppliers to the existing list of suppliers the Canada Council can call upon for **professional services and expertise** for various RMDA / CADAC Projects.

A Standing Offer Agreement is an arrangement to provide goods and services at prearranged prices with set terms and conditions, for specific periods of time on an “as requested” basis. A Standing Offer is not a Contract, and an Order against a Standing Offer is a “Call-up”. Each Call-up is a separate Contract between the Council and the prequalified supplier.

Public corporations, small businesses, and independent professionals (freelancers), consortium of researchers offering the above-mentioned services may apply for services included on this list.

About the Canada Council for the Arts

The [Canada Council for the Arts “The Council”](#) contributes to the vibrancy of a creative and diverse arts and literary scene and supports its presence across Canada and around the world. The Council is Canada’s public arts funder.

Its grants, services, initiatives, prizes, and payments support Canadian artists, authors, and arts groups and organizations. This support allows them to pursue artistic expression, create works of art, and promote and disseminate the arts.

Through its arts funding, communications, research, and promotion activities, the Council fosters ever-growing engagement of Canadians and international audiences in the arts.

RMDA and CADAC Services and Expertise

The Research, Measurement and Data Analytics (RMDA) Section undertakes evidence-based research, program evaluation and performance measurement activities related to the Council’s priorities and commitments, as well as sector-wide trends in the arts. Our work supports decision-making and promotes the value of the Council’s investment in the arts.

RMDA is seeking to engage suppliers to obtain specialized expertise to support them in carrying out their responsibilities related to the development and implementation of the new CADAC System.

CADAC or Canadian Arts Data / Données sur les arts au Canada is a web-based application dedicated to the collection, dissemination, and analysis of financial and statistical information about Canadian arts organizations.

Through a joint effort of arts funders across the country, CADAC provides a simplified process and standardized forms for arts organizations applying for operating grants. Arts organizations making application to multiple funding agencies submit their financial and statistical information in a single format, to a single platform, which provides them access to their own historical data and to reports on both their own organizations and comparisons to all similar organizations in the database. Public sector funding agencies have immediate access to current and consistent data for all the arts organizations they fund. Aggregate data across CADAC is also accessible, allowing for reliable and consistent analysis of the Canadian arts sector. Individually and collectively, funding agencies will be able to report on the health of the field and the impact of the arts in their communities.

The overall CADAC objectives are the following:

- Improving accountability and transparency for both funders and applicants by reviewing and validating financial data;
- Maintaining statistical data for the arts, with a view to improving the quality of such data, as a joint effort of the CADAC Members and the Council;
- Informing assessment processes, research, policy and program development, performance measurement and evaluation; and
- Providing data that help demonstrate the value and reach of public funding of the arts.

In 2021, a new CADAC Master Service Agreement was signed between the Canada Council for the Arts and the following Canadian public:

Alberta Foundation for the Arts, British Columbia Arts Council, Calgary Arts Development Authority, City of Greater Sudbury, City of Kingston, City of Saskatoon, City of Vancouver, City of Toronto, Edmonton Arts Council, Manitoba Arts Council, New Brunswick Department of Tourism, Heritage and Culture, Newfoundland and Labrador Arts Council, Ontario Arts Council, Saskatchewan Arts Board, Toronto Arts Council and any new member that the Council approves, in its discretion, and which becomes a party to this MSA in accordance with the terms of this MSA (collectively named the “CADAC Members”)

to develop and implement a new CADAC system that is expected to be launched by the end of 2022.

B. INFORMATION FOR SUPPLIERS

Submission of Proposals

Suppliers must submit their proposals no later than **May 12, 2022, at 5 p.m. (EST)** (Ottawa local time) by email, mentioning the Standing Offer (SO) in the subject line.

Any questions regarding this SO shall be submitted in writing, via email, and the Council will respond accordingly. The deadline for submitting questions is **April 28, 2022, at 12:00 p.m. EST** (Ottawa local time). To ensure that all firms receive equivalent information, the Council will post applicable clarification questions and responses on MERX and the Council's website (<https://canadacouncil.ca/about/requests-for-proposals>).

The following schedule will be followed for this Standing Offer RFP:

| | |
|--|----------------|
| Publication of Standing Offer RFP | April 21, 2022 |
| Deadline for questions regarding the Standing Offer RFP | April 28, 2022 |
| Deadline to respond to questions regarding the Standing Offer RFP | May 5, 2022 |
| Deadline for submissions | May 12, 2022 |
| Presentations or additional requests from short-listed Firm(s) if required | May 19, 2022 |
| Contract negotiations | June 3, 2022 |
| Start of contract | June 9, 2022 |

For any information and questions about the Standing Offer, please contact:

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Marie-Chantale.Pilon@canadacouncil.ca

Form of Proposal

To ensure that all proposals are uniformly evaluated, they shall be submitted in the format prescribed in **Appendix 1. Your proposal must be no longer than eight (8) pages and must include the information requested in Appendices 1 and 2.**

All proposals must be signed by a duly authorized officer and include a statement that the supplier has examined and understood the SO and accepts the conditions contained therein.

The proposal must state that the supplier has the technical and financial and human resources to provide the services as identified in this SO, and within the timeframes specified in this proposal.

Acceptance or Rejection of Proposals

The Council reserves the right to reject any or all proposals or to accept any proposal at its discretion.

Proposals will not be read prior to the specified closing date and time. Any proposals received after the specified closing date will be discarded.

Modification or Withdrawal of the Request for Proposals

Suppliers may modify their proposal up to the closing date of the competition, as specified.

Any correction or clarification relating to the request for proposals will be published in the form of an addendum and sent to all concerned suppliers. No interpretation, correction, clarification, or modification to the request presented in any form other than an addendum shall engage the Council. Suppliers must acknowledge receipt of all addenda in their proposals.

Period of Validity of Proposal

Proposals submitted must remain open for acceptance by the Council for a period of no less than sixty (60) days from the specified closing date.

Period Covered by the Standing Offer

This Standing Offer will begin on June 9, 2022, and end on March 31, 2024, with the option to renew for two (2) additional periods of one (1) year.

Confidentiality and Council's Obligation

All data and information provided to the supplier, including the SO 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 or reused without the express written consent of the Council.

Furthermore, the copyright of analysis and reporting produced, including their corresponding data, texts, tables, charts, and calculations shall be property of the Canada Council, and the supplier will have no right to reuse them.

The issuance of this SO 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 supplier for preparation costs or other losses incurred in the preparation of their response to this SO. The Council shall have the right to use, for any purpose, any information submitted in connection with the SO unless it has been marked Confidential.

Evaluation of Proposals

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

- Pricing;
- Ability to provide a highly personalized, responsive, efficient and practical services in both official languages;
- Ability to produce high quality, comprehensive, and insightful critical analysis, with attention to issues of equity and inclusion;
- Education and years of experience pertinent to the services required (as outlined in section 2);
- References and quality of examples of documents submitted.
- Experience in arts and cultural research is an asset.

Extent of the Obligations of the Canada Council for the Arts

This invitation to submit a proposal as supplier and the Council's receipt of that submission in no way obliges the Council to offer work to a supplier, nor does it entitle the supplier to receive work from the Council.

The Council retains full decision-making authority regarding proposals that respond to the requirements laid out in the standing offer and regarding evidence demonstrating the respect of these requirements. As well, the Council reserves the right, at its sole discretion, to:

- Suspend the standing offer at any time;
- Negotiate with none of the suppliers who have submitted proposals;
- Ask, orally or in writing, for clarifications regarding any additional information concerning proposals judged to be adapted to its needs.

Requests for Service or Requests Subsequent to the Standing Offer

The Council shall provide the supplier with the necessary data and information¹ (by email, USB key, and/or other data sharing platforms), including the documentation and information required for the work, delivery dates and a description of the work, to permit

¹ All selected suppliers will be required to sign a contract in which both parties agree and recognize that all Intellectual Property Rights, including any software, documentation, drawings, data, information, database or product provided by the Canada Council, or created or produced by the Offeror, in performing the Services requested will be the exclusive property of the Canada Council. As such, all data and information shall be kept strictly confidential and shall not be disclosed to any third party or reused without the express written consent of the Council.

the supplier to determine whether it can accept and process the work requested within the deadlines specified by the Canada Council.

The characteristics of each research service and expertise will be defined in coordination with the supplier for each request of service subsequent to this Standing Offer.

C. REQUIREMENTS FOR PROFESSIONAL SERVICES AND EXPERTISE

1. GENERAL CONSIDERATIONS

Quality of Work, Response Time, and Respect for Deadlines

It is expected that all suppliers offering professional research services and expertise to the Canada Council will provide these services in a timely manner, with the highest possible level of accuracy and quality. To this end, suppliers are expected to verify the quality of their own work before delivering the finished product to the Canada Council. The Council may choose to refuse a job or ask for compensation if the work is considered to be poor quality (incomplete; unsubstantiated findings or methodological issues; numerous typographical, syntax, calculation or analytical errors; work that requires extensive revision by the Council).

Suppliers must provide quality assurance for their own work – **they must review their analysis and reporting and all documents before submitting the completed work to the Canada Council. Furthermore, it is required that all suppliers sign an attestation to the effect that the analysis employed in the research and reporting have been verified and validated.**

Requests for projects will be sent to suppliers by email and suppliers are expected to indicate interest by email for any request from the Council **within 48 hours following the request** (normal hours of work). Once a job is accepted, the supplier must respect the required deadline.

Technical, Operational and Organizational Environment

Suppliers must be able to share electronic documents in Microsoft Office (xls, csv, doc, ppt, etc.), or other software used during the development of each project, as requested by the Canada Council.

Location of Work Site and Delivery

Suppliers are expected to work from their own locations and communicate with the Council by phone, video conference and/or by email. All completed work is to be delivered to the Canada Council in electronic format via email or electronic file transfer.

Confidentiality

The supplier must ensure the confidentiality of all data, files, and texts assigned to them.

Rush Work

From time to time, the supplier may be asked to respond to urgent or “rush” call-ups. If the supplier accepts such work, it shall be invoiced at the rush rates specified in the Supplier’s *Rates and Services Grid* submitted in response to this SO Agreement.

Special Requirements

The Council will describe any special requirements of the work on the request for service. Suppliers must seek approval for any surcharges or additional costs (above and beyond those identified in the *Rates and Services Grid*) prior to commencing work on any such request. Suppliers must also notify RMDA / CADAC staff if they expect any delays or upsets due to the special requirements.

2. SCOPE OF SERVICES and TYPES OF PROFESSIONAL SERVICES

RMDA / CADAC works closely with suppliers and may require them to develop and implement support projects in the following areas for which it seeks external services and expertise:

- A. Provide expertise on not-for-profit and for-profit accounting, and financial health analysis;
- B. Provide training to improve financial and statistical data literacy and reporting in the arts sector;
- C. Provide training to enhance the understanding and the usage of the CADAC system, processes, financial and statistical forms and reporting.

The Council expects that the supplier will perform the activities under the following areas:

A. Provide expertise on not-for-profit and for-profit accounting, and financial health analysis.

- The required services to support RMDA/CADAC may include, but are not limited to the following:
 - Provide advice to help CADAC members and Council staff enhance their not-for-profit and for-profit accounting knowledge and understand the impacts of new accounting standards, Financial Statements presentation, accounting of public funding programs;

B. Provide training to improve financial and statistical data literacy and reporting in the arts sector.

- The required services to support RMDA/CADAC may include, but are not limited to the following:
 - Assist in assessing and planning Council staff and CADAC members knowledge, skills, and abilities (KSA) needs related to not-for-profit and for-profit accounting and financials.
 - Build training programs and content that will:
 - i. Enhance KSAs for Council staff and CADAC members on financial statements, financial and statistical analysis and reporting, and other related subjects identified.
 - ii. Enhance KSAs for Arts Organizations to help them understand the links between their financial health and accounting practices (see example provided on Theater organizations by clicking on this link: [Arts Facts using CADAC Data: 191 Theatre Organizations | Canada Council for the Arts](#)).
 - iii. Support the Council on preparing reports using CADAC financial and statistical data.
 - Conduct training sessions with the key stakeholders.

C. Provide training to enhance the understanding and the usage of the CADAC system, processes, financial and statistical forms and reporting.

- The required services to support RMDA/CADAC may include, but are not limited to the following:
 - Assist in assessing and planning knowledge, skills, and abilities on the usage of the CADAC system, processes, financial and statistical forms and reporting to arts organizations and CADAC members and staff.
 - Build a training program and content that will permit CADAC users to master the usage of the CADAC system and master its functionalities (ex: registration, program lists, forms, reporting, etc.);
 - Conduct training sessions with the CADAC stakeholders.

4. TASKS & METHODOLOGIES

The supplier(s) may be asked to undertake one or more of the following components in different phases of financial analysis projects. This is not necessarily an exhaustive list as new and innovative methodologies may be presented or developed in the future.

Planning Phase

Exploration phase of a theme and its major issues conducted to define the research parameters and produce the Terms of Reference of the Research.

- **Evaluation Assessment**

The supplier(s) may be required to conduct an evaluation to determine the needs of the different stakeholders for each of the services. An evaluation will enable to:

- Better understand the information available and the needs of the stakeholders;
- Review what is currently available in the market and what needs to be developed;

- **Development of advisory, training and support approaches and solutions**

The supplier(s) may be required to give advice and guidance on the selection and application of different approaches and methods for different projects. This requires a good knowledge of the different approaches used in the advisory, training, support, financial and statistics, and accounting fields.

An agile and iterative approach is recommended to ensure that the RMDA/CADAC staff and CADAC stakeholders can quickly adapt to requirements changes without negatively impacting release dates. This approach is known to help reduce technical issues and misunderstandings, improve customer satisfaction, and deliver a higher quality product.

Execution Phase

- **Advisory – Subject Matter Expertise**

The supplier(s) may be required to provide expert advice on a particular subject matter themselves or to seek independent advice. This expert advice may be required in assisting with approaches, validating findings, and providing recommendations.

- **Training**

The supplier(s) may be required to prepare, conduct, pilot training and evaluate the training performance. This may entail preparing the training schedule, organizing the training sessions, material, and support tools, developing pre-recorded material when needed, testing, and conducting the training, and evaluating the training sessions efficiency.

- **Support**

The supplier(s) may be required to assist with supporting to keep up with potential additional demands from arts organizations using the CADAC system and understanding what they need to do. This can include, as examples, password management, CADAC usage, data entry, generating reports, etc.

Monitoring & Regular Meetings

The supplier(s) will be expected to meet in person, or be available for virtual meetings or teleconference, with Council representatives and other stakeholders, at the beginning of each Task Authorization. The supplier(s) will be expected to attend

meetings in person, or participate through virtual meetings of teleconference, at key milestones of the project which would involve providing written project status updates, tabling and discussion of draft products, and recommendations.

Closing Phase

This is the stage where all deliverables are finalized and formally transferred to Canada Council RMDA / CADAC, and all documentation is signed off and approved. The supplier is required to ensure that all work agreed on to be completed during the projects is remitted.

5. ROLES AND RESPONSIBILITIES

RMDA / CADAC

RMDA will ensure that appropriate subject matter experts from within the Council are available to the supplier(s) to discuss and provide content material, as well as facilitate cooperation with other Council staff, representatives, or stakeholders, as required. If required, RMDA / CADAC will also provide the supplier(s) with access to on-site Council facilities and/or workspace, subject to prior written authorization.

The Supplier(s)

The supplier(s) will be responsible for fulfilling the deliverables specified within each individual Task Authorization, providing RMDA / CADAC with regular reports on progress, respecting agreed deadlines and budget, and delivering work that is methodologically sound, of high quality and in conformance with professional standards.

6. OTHER

Translation and accessibility

All graphs, tables, charts, and infographics must be produced by the supplier(s) in both official languages and formatted for accessibility for the final version of the report. Translation of the text body of the final report will be performed by the Council. All data must be provided in English and French, in XLS or CSV format.

Data Privacy and Confidentiality

All sensitive data collected on behalf of the Council, which has been identified as Protected B (personal information), must be stored in a computing facility located within the geographic boundaries of Canada. Service providers must ensure the storage of data is within the boundaries of Canada. When the data physically resides in Canada, it is subject to the protections afforded by Canadian privacy laws and the Council will be better situated to take prompt action, for example, if access to data is

compromised. Keeping data resident in Canada is also important for safeguarding sensitive information.

The supplier(s) should demonstrate that they have the capacity for privacy and security procedures that are monitored and enforced. Also, the supplier(s) should have mandatory and ongoing privacy, confidentiality, and security training for all individuals and/or team members including those at external collaborating or subcontracting sites.

Training Materials and Financial and Statistical Reports

The supplier(s) should demonstrate their capacity to prepare and present training materials and support on creating a learning environment that encourages growth and development. Training content is critical for anyone to develop and improve their knowledge, skills, and abilities so that they can readily focus on executing the requested actions that they need to perform.

Key principles of developing and conducting training:

- Set clear learning objectives for the training material
- Improve knowledge, skills and abilities that can readily be applied
- Improve the uniformity and application of work processes and procedures
- Provide actionable guidance and recommendations linked to on-the-job applications
- Provide feedback moments that will help contextualize learnings
- Assess performance and mastery of the learned KSAs

The supplier(s) should also demonstrate their capacity to train on preparing financial and statistical reports. Data reports are written so that readers can readily focus on and understand the important issues being reported.

Key principles of the written reports:

- are concise and clearly written;
- include only information that is needed for a proper understanding of the findings, conclusions and recommendations;
- include an accurate assessment of the results achieved as well as clear conclusions on their relevance and performance;
- present the conclusions and recommendations so that they flow logically from research findings;
- clearly expose the constraints and limitations of the research with respect to the design and methods;
- satisfy, where applicable, the Council's reporting requirements, including best practices for documents, visualization and web accessibility;
- provide the reader with appropriate context by describing the objectives and timing of the work and its rationale;
- contain clear and actionable recommendations (if appropriate and requested by the Council); and,

APPENDIX 1: PROPOSAL FORMAT

Part A: Summary of Proposal (maximum 2 page)

Please indicate rates only for services in subject areas that are relevant to your expertise and interest (i.e., A. Provide expertise on not-for-profit and for-profit accounting, and financial health analysis; B. Provide training to improve financial and statistical data literacy and reporting in the arts sector; C. Provide training to enhance the understanding and the usage of the CADAC system, processes, financial and statistical forms and reporting to arts organizations and CADAC members and staff.

Part B: Supplier Information (maximum 4 pages minus section i) below)

The following information must be provided with the supplier's application to be considered for inclusion in the Canada Council list of pre-qualified Canadian and international suppliers regarding areas that are relevant to your expertise and interest:

- a) Information about the supplier's business status: nature of the business (e.g., incorporated, partnership, self-employed), business numbers and GST number, if applicable. A consortium of Canadian and international researchers are accepted as pre-qualified suppliers;
- b) Contact information (including web site and email addresses);
- c) Years of experience and/or date of incorporation;
- d) List of relevant current projects, as well as references or testimonials from past or current projects;
- e) Names, profiles, and years of related experience of all individuals and their anticipated role in research projects;
- f) Capacity to provide services in both Canada's Official Languages;
- g) Knowledge and experience preparing documents that are accessible for persons with disabilities;
- h) Description of the supplier's proficiency in:
 - I. Conducting projects both small and large scale,
 - II. Project management and tracking,
 - III. Quantitative descriptive and inferential financial and statistical analysis,
 - IV. Production of reports,
 - V. Production and delivery of training and presentations,
 - VI. Supporting organizations as a third party which they represent their client.
 - VII. A description (500 words), of the supplier's approach to diversity and inclusion and their commitment to reflecting the diversity of their community within their team, including gender diversity, representation of Indigenous Peoples, Black and racialized people, people who are Deaf or have disabilities, and official language minority communities.
Provide details about:
 - What strategies (e.g., corporate policies, programs, etc.) do you have in place to ensure the reflection of the diversity of your community within your team? How long have these been in place?
 - How have these been communicated and implemented?

- Have any outcomes or targets related to equity and inclusion been set and if yes, have you achieved these targets?
- What other successes have you had in ensuring the reflection of the diversity of your community?

Note: organizational applicants/bidders should not disclose personal information for their employees in their response.

- i) Examples of work: the supplier must provide examples of work that is considered to be representative of the type of work and quality that it typically produces; these examples could include (maximum 30 pages):
 - a. A report that includes financial and statistical analysis and/or qualitative analysis),
 - b. A research paper or literature review,
 - c. A training material and support documentation,
 - d. A focus group or an online board model,
 - e. A presentation,
 - f. A data visualization.
- j) Quality assurance statement: The supplier must provide a description of how it ensures the quality and accuracy of its work;
- k) The *Rates and Services Grid* (see Appendix 2) duly completed.

Part C: Suitability of the Supplier (maximum 2 pages)

In this section, the supplier should explain the reasons why it feels it is best suited to respond to the Council's needs in the conduction of CADAC projects in areas that are relevant to your expertise and interest.

APPENDIX 2: RATES AND SERVICES

This Rates and Services Grid must be completed by the supplier as part of its application to be included on the list of pre-qualified suppliers.

Please indicate rates only for services in subject areas that are relevant to your expertise and interest.

Please identify any specific costs related to accessibility for researchers who are Deaf and or have a disability. Note that these costs will not impact the assessment of your budget.

Rates remain in effect until March 31, 2024.

| Services | Rates by staff involved in the services offered | |
|--|---|---|
| | Regular Rate (Hourly Rate in \$CA) | Rush Rate* (Hourly Rate IN \$CA) |
| | <i>(Enter N/A for services not offered)</i> | |
| Services related to: | | |
| A. Provide financial and accounting expertise Provide expertise for not-for-profit and for-profit financial and accounting, and financial health analysis | | |
| B. Provide training to improve financial and statistical data literacy and reporting in the arts sector | | |
| C. Provide training to enhance the understanding and the usage of the CADAC system, processes, financial and statistical forms and reporting | | |

**If rush rates are applicable, describe how these are applied on a separate sheet appended to this grid.*