

REQUEST FOR PROPOSAL

**Indigenous financial education and consumer
protection resource development**

Deadline: 12:00pm EST on January 2, 2025

Request for Proposal

Background

Purpose

Prosper Canada is requesting proposals for the expert assistance of an Indigenous consultant to develop a tailored educational resource that will provide Indigenous recipients of lump sum payments (such as settlement payments, tax refunds, and lottery wins) information and tools to navigate the implications and possibilities created by these payments.

The information in this document serves to facilitate the preparation of your proposal. If you require additional information or clarification of the content of this RFP, please contact us (see contact details at the end of this document). Information provided will be shared with all consultants who respond to this RFP.

About us

[Prosper Canada](#) is a national charity working to expand economic opportunity for people living in poverty through program and policy innovation.

Our vision is a Canada in which everyone has access to the financial programs, policies, products, and advice they need to build their financial well-being.

As Canada's leading champion of financial empowerment, we work with business, government, and community partners to develop and advance financial policies, programs, and resources that transform lives and foster the prosperity of people living in Canada. We help service systems and organizations in all sectors to build proven financial empowerment approaches into their operations in ways that are sustainable, help them achieve their goals, and tangibly increase the financial well-being of the people they serve.

Context for this RFP

The Learning & Training team at Prosper Canada, in collaboration with [AFOA Canada](#), is working on a project to **develop and distribute tailored consumer protection resources to support Indigenous individuals and families who receive lump sum payments, including recipients of the [First Nations Child and Family Services and Jordan's Principle Settlement](#)**. The Federal Court has approved the settlement agreement that will see \$23.3 billion in compensation to approximately 300,000 eligible First Nations members who experienced discrimination through the First Nations Child and Family Service Program and with respect to failure to apply Jordan's Principle.

We have completed our research and needs assessment with subject matter experts including frontline staff from organizations working in Indigenous communities, Indigenous and non-Indigenous financial wellness experts, and Indigenous people with lived experience of receiving

lump sum payments. We have identified that there is a need for resources to be considerate of inter-generational trauma, to cover some basics of financial education, such as setting and prioritizing financial goals, protection from fraud and scams, and options for the future, including saving and investing, entrepreneurship, and education, and to address mental health concerns such as sudden wealth syndrome.

Prosper Canada is seeking a consultant to develop the educational resource that will support this initiative. Associated activities are detailed in the Deliverables section below.

Deliverables, timeline, and budget

Through this RFP, we are seeking an Indigenous consultant with instructional design, content writing, and graphic or media design expertise to:

1. **Outline and develop content for a financial education resource** for Indigenous recipients of lump sum payments by March 15, 2025.
 - Review existing project information to be provided by Prosper Canada, including notes from research, needs assessment, and co-design activities, to inform the development of the resource.
 - Participate in a virtual working group session in mid-January, 2025, coordinated by Prosper Canada, and incorporate input from the session to inform the design and content outline of the resource.
 - Consider the inter-generational trauma of Indigenous Peoples, strategies for managing cultural pressures unique to Indigenous individuals and communities, connections to relevant Indigenous teachings, tailored financial literacy information, and effective visual and media approaches and formats to support the content.
 - Draft the resource content implementing effective instructional and content design, trauma-informed principles, and accessibility best practices.
 - Write culturally appropriate and trauma-informed copy for the resource.
 - Incorporate and coordinate content review cycles with relevant stakeholders.
2. **Layout and produce the final designed resource in two languages (English and French)** with visual, graphical, and/or media elements to support the resource by May 15, 2025.
 - Make recommendations for designs and layouts that support the effective communication of information in the resource.
 - Create culturally appropriate images, graphics and/or media assets to enhance the information and messaging of the resource.
 - Layout and produce the final resource, ensuring that the resource and all its elements meets accessibility requirements.

- Incorporate and coordinate review cycles with relevant stakeholders.

Our budget for this contract is **\$33,000** for the complete development and production of this resource including content writing, graphic/media production, and accessible formatting. Direct expenses for French translation may be billed to Prosper Canada with Prosper Canada's approval on the selected vendor and a written quotation obtained from the selected vendor.

What we are looking for

Consultant requirements

We are looking for consultants with:

- Subject matter expertise in Indigenous cultural knowledge and Indigenous financial wellness, to support the development of the resource with Indigenous cultural relevance
- Subject matter expertise in financial literacy and financial education for Indigenous audiences, to ensure appropriate and relevant financial information is shared with Indigenous recipients of lump sum payments
- Expertise and experience in designing, writing, and facilitating material for Indigenous audiences, to ensure that the design, content, and language are tailored for Indigenous audiences
- Skill and experience in graphic or media design and production of informational or educational resources for Indigenous audiences, to ensure that visual or media elements and layouts or formats support the informational and education content of the resource and are relevant for the target audience
- Skill and experience collaborating with and incorporating input from multiple stakeholders, including subject matter experts, key informants with lived experience, frontline service providers, partners from non-profit organizations and from Indigenous organizations
- Skill and experience managing resource development projects in partnership with learning and training-oriented teams
- Skill and experience implementing best practices in project management, instructional and content design, and accessibility

Proposal content

In your proposal, please include:

1. **A profile of your firm** that includes your experience working on the production of resources and educational materials for Indigenous Peoples.

2. **The proposed project team** with a brief bio of each team member. Please provide information on subcontractors, if any.
3. **An outline of your team’s proposed approach**, including key activities, milestones, and timelines, that includes consideration for:
 - a. Demonstration of agile methods and processes to enable ongoing collaboration and communication with our partners and stakeholders, with opportunities to incorporate reflection and learning throughout
 - b. Honouring of the [six Rs of Indigenous research](#) framework (Tsosie et al.), with consideration for the themes of respect, relationship, relevance, reciprocity, responsibility, and representation
 - c. Application of the First Nations principles of OCAP® (ownership, control, access, and possession) to First Nations’ data and information collection, protection, usage, and sharing, where relevant
 - d. Acknowledgement of, and minimizing where possible, the potential for harm that could be caused to partners and participants in this project. The topic of settlement payments may be triggering or traumatic to individuals and communities affected through interactions with the First Nations Child and Family Services Program.
4. **An estimated total cost and budget breakdown.**
5. **References from three clients** your firm has supported within the last three years.
6. **Three samples of work** that your firm has completed within the last three years, particularly narrative or story-telling samples with aligning visuals.
7. The name, title, and contact details of the individual(s) to be contacted in the event your agency is shortlisted, or if further information or clarification about your proposal is required.

Evaluation criteria

Prosper Canada will select the firm we deem to be the best qualified and most suitable to provide the services requested. We will evaluate proposals that meet the above requirements against the following criteria:

| Criteria | Weight |
|---|------------|
| Relevant experience and successes , of note: <ul style="list-style-type: none"> • Subject matter expertise in Indigenous cultural knowledge, Indigenous financial wellness, and Indigenous financial literacy and education | 50% |

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|--|------------|
| <ul style="list-style-type: none"> • Expertise and experience in writing content for Indigenous audiences • Skill in graphic and media design and production of informational or educational resources for Indigenous audiences • Experience working with diverse groups of stakeholders and resource development teams | |
| Thoughtfulness of approach to delivering on the project objectives and deliverables | 30% |
| Demonstrated creativity and flexibility | 10% |
| Value for money or pricing structure | 10% |

RFP Conditions

Fixed price and term

Prosper Canada will hire the successful proponent (firm) on a fixed-price contract basis, where the duration and amount of the contract will be agreed at the outset of the project, based on the quote prepared in response to this RFP and any subsequent mutually agreed upon amendments.

How to submit your proposal

Please indicate “Indigenous resource RFP” in the email subject line and submit your proposal electronically by **12:00pm EST, January 2, 2025** to:

Prosper Canada Learning & Training

training@prospercanada.org

and

Carrie Wong

Senior Manager, Learning and Training

cwong@prospercanada.org