



## **UNION OF ONTARIO INDIANS**

### **REQUEST FOR PROPOSALS**

#### **PROJECT CONSULTANT**

#### **FIRST NATIONS TAX EXEMPTION SOLUTIONS REPORT**

##### **1.0 SUMMARY OF WORK**

The Union of Ontario Indians (UOI) seeks a project consultant to produce a detailed report, leveraging market research and data analysis to evaluate the efficiency and practicality of different point-of-sale (POS) system integrations and modernization strategies for retail operations, with a focus on member First Nations reserves. This report will explore the feasibility of developing a proprietary First Nations POS system and/or application programming interface (API) that will resolve issues with handling transactions of Indian Status consumers and in particular the Ontario gasoline tax rebate system. The project includes engaging POS system providers and other developers, collecting and analyzing relevant business data, and presenting findings in workshops and meetings. The final goal is to generate a comprehensive report with options on POS solutions with consideration to costs and timeframes.

##### **2.0 CORPORATE OVERVIEW**

The Anishinabek Nation (AN) incorporated the UOI as its secretariat in 1949. The AN is a political advocate for 39 First Nations throughout the province of Ontario from Golden Lake in the east, Sarnia in the south, Thunder Bay and Lake Nipigon in the North. The 39 First Nations have an approximate combined population of 65,000 citizens. The AN has four strategic regional areas, Southwest, Southeast, Lake Huron and Northern Superior.

The AN has its head office located on Nipissing First Nation, just outside of North Bay, Ontario and has satellite offices in Fort William First Nation, Thunder Bay, Curve Lake First Nation, Garden River First Nation, Munsee-Delaware Nation and

Sudbury. The AN delivers a variety of programs and services, such as Economic Development, Lands and Resources, Health, Social Services, Education, Policy, Communications, in addition to providing the necessary forum for collective First Nation action on issues through the Chiefs in Assembly.

To learn more about the AN, please visit our website at [www.anishinabek.ca](http://www.anishinabek.ca).

### **3.0 PROJECT BACKGROUND.**

The Anishinabek Nation has been representing interested members at the table with Ontario to discuss mutually beneficial solutions related to the gasoline and tobacco industries. The objectives on this matter are to 1) not interfere with the competitive advantage of on-reserve businesses, 2) seek a portion of the gas tax revenue currently only shared with municipalities, 3) promote legitimate economic structures and processes within First Nations, and 4) improve the currently flawed gas tax rebate system.

Concurrently, the Ministry of Finance is modernizing its systems by introducing electronic payments and document filing for tax and non-tax programs. This modernization is part of a broader effort to reduce bureaucratic obstacles for Ontarians and promote digital solutions to streamline administrative processes. Aligning with and supporting this objective is a timely opportunity for First Nations.

Engagement undertaken thus far has highlighted the importance of efficient data collection and the use of new technologies to achieve the abovementioned objectives. Effective data collection improves coordination between the First Nations administration and on-reserve businesses. At present, First Nations retailers often encounter significant barriers, including limited technological capacity, financial constraints, and inadequate infrastructure, hindering their ability to adopt modern systems.

Data sovereignty is a key concern noted by our First Nations. Ensuring that data collection and management practices are culturally sensitive, respectful, and aligned with First Nations' needs is vital for building trust and encouraging voluntary compliance. This project aims to address these challenges by enhancing communication and information sharing between First Nations, business owners, and regulatory bodies.

### **4.0 STATEMENT OF WORK**

The UOI is seeking a project consultant to carry out the following work:

- **Research and Engagement:**
  - Conduct desktop research and carry out necessary stakeholder engagement to collect data related to the:

- Available technological solutions (to supplement the 2023 Technological Requirements and Digital Innovation Report)
    - Legislative landscape (e.g. relevant legislation requiring amendments and/or new legislation that must be developed)
    - Financial considerations (e.g. estimated costs to develop software solutions, purchase and/or modify terminals, compliance certification, maintenance and technical support, training, and others as identified during research)
  - Carry out interviews with AN representatives to identify steps necessary for corporate approvals and member First Nation adoption
  - Propose additional methods of engagement to enhance the analysis
- **Analysis:**
    - Analyze the above findings to determine the viability of creating a proprietary POS solution tailored for First Nations in Ontario
    - Evaluate the effectiveness of current transaction methods used on reserve, with a focus on the current gasoline tax rebate system
- **First Nations Tax Exemption Solutions Report:**
    - Develop a report that includes the following information:
      - Technical considerations:
        - Existing systems and technologies
        - Necessary technical infrastructure and capacity
        - Support needed at the retailer level
      - Legal considerations:
        - Legal requirements and processes for implementation
        - Resources and time required to address legal and regulatory aspects, and
      - Financial considerations:
        - Costs associated with activities identified through
        - Development and implementation costs
        - Financial benefits and potential risks for First Nations retailers and administrations
      - Timelines for the various levels of solutions, to include:
        - Development and implementation schedule
        - Technical and operational capacity schedule
      - Short-, medium-, and long-term recommendations for on- and off-reserve tax exemption solutions
    - Present findings through workshops and direct stakeholder meetings

## 5.0 DELIVERABLES

- One (1) electronic copy of the draft First Nations Tax Exemption Solutions Report;
- One (1) electronic copy of the final First Nations Tax Exemption Solutions Report; and

- All supporting data and documentation used in the development of the above deliverables (electronic).

## **6.0 FINANCIAL CONSIDERATIONS**

The total budget for this project should not exceed **\$80,000**. The total budget for this project must include all costs associated with personnel, travel, key informant interviews, preparation of reports and required documentation, overhead costs, all eligible taxes and any other anticipated expenditures.

## **7.0 TIMEFRAME**

The project will run from December 13, 2024 to April 30, 2025.

## **8.0 PROPOSAL RESPONSE GUIDELINES**

To ensure your proposal is considered for evaluation, it must include the following:

### **Cover Letter**

- Dated and signed by a person authorized to negotiate and make commitments, and provide clarification with respect to the proposal on behalf of the bidding proponent or firm;
- A statement indicating the proponents understanding of the proposed project and the deliverables required;
- Reference the title of the RFP;
- Indicate the capacity of the proponent to complete the project; and
- The name of a single point of contact from your company.

### **Proposed Project Plan**

- A proposed project plan, with timelines, that indicates the steps to be taken from the start of the contract to the final deliverable.

### **Qualifications**

- Provide examples of previous relevant work experience; and
- Identify the qualifications and experiences of the project team.

### **Costs and Charges**

- Provide an all-inclusive fixed-cost quotation for this project; and
- Identify the expected costs and their allocation.

## **9.0 INQUIRIES**

All inquiries about this request for proposals should be directed to:

**Name:** Brandon Manuel  
**E-mail:** [brandon.manuel@anishinabek.ca](mailto:brandon.manuel@anishinabek.ca)  
**Telephone:** 1-877-702-5200 or (705) 497-9127 ext. 2278

## **10.0 SUBMISSION PROCEDURE**

As a potential supplier of these professional services, you are invited to submit a proposal to provide professional 3<sup>rd</sup>-party contractor services in accordance with the terms and conditions detailed in this document.

Please submit your proposal by fax to:

**Fax:** (705) 497-9135

**OR**

**Email:** [ecdev@anishinabek.ca](mailto:ecdev@anishinabek.ca)  
**Attention:** Economic Development

Proposal packages must be clearly marked: **First Nations Tax Exemption Solutions Report**

**Closing Date and Time:** Proposals must be received by **December 3, 2024**, at 8:30am. Proposals received after the closing time will not be considered.

**Project Completion:** The project completion deadline is **April 30, 2025**.

## **11.0 REQUEST FOR PROPOSALS PROCESS**

Upon closing, proposals will be reviewed for completeness. Only completed proposals will be brought forward to the selection committee for further consideration and a final decision.

Eligible proposals will be evaluated based on the response guidelines in section 8.0.

## **12.0 SELECTION OF SUCCESSFUL PROPONENT**

The UOI reserves the right to reject any or all proposals and to accept the proposal deemed most favorable to the interests of the UOI and its partners.

The UOI reserves the right to seek clarification and supplementary information from proponents after the submission deadline.

Proponents will be notified in writing once a selection has been made.

## **13.0 CONTRACT NEGOTIATION**

The UOI will enter into a contractual agreement with the preferred proponent. The UOI, at any time, and without liability, may withdraw from negotiations with any potential proponent.

#### **14.0 TERMS AND CONDITIONS**

- 14.1 The UOI will not be responsible for any costs incurred by a proponent in preparing and submitting proposals. The UOI accepts no liability of any kind to a proponent prior to the signing of a contract.
- 14.2 Submissions of a proposal shall not obligate, nor should it be construed as obligating the UOI, to accept any such proposal, or to proceed further with the project. The UOI may, in their sole discretion, elect not to proceed with the project, and may elect not to accept any, or all proposals for any reason.
- 14.3 A proponent may amend or withdraw their proposal prior to the closing date and time specified in the request for proposals by way of written notice to the UOI.
- 14.4 Proposals submitted shall be final and may not be altered by subsequent offerings, discussions, or commitments, unless the proponent is requested to do so by the UOI.
- 14.5 The proponent must identify any information in its proposal that it considers to be confidential or proprietary.
- 14.6 All proposals and accompanying documentation received under this competition will become the property of the UOI, and will not be returned.
- 14.7 The UOI has reserved the right to waive minor non-compliance by a proponent with the requirements of the RFP. This will allow the UOI to consider and possibly accept, any proposal which is advantageous, even though the proposal may be non-compliant in some minor respect.
- 14.8 The UOI reserves the right to accept or reject, in whole or in part, any and all proposals.
- 14.9 The UOI reserves the right to cancel and/or re-issue this request for proposals at any time, for any reason, without penalty.
- 14.10 Prices quoted are to be held firm for a minimum of 90 days following the RFP closing date, and shall remain in effect through the duration of an agreement.

- 14.11 The proponent's proposal shall form part of the contractual agreement by attachment, and will be incorporated for reference. Claims made in the proposal shall constitute contractual warranties. Any provision in the proposal may be included in the contractual agreement as direct provisions thereof.
- 14.12 The successful proponent agrees to obtain and maintain all professional certification and licenses necessary to lawfully provide the services required under this request for proposal.
- 14.13 By submitting a proposal, the proponent agrees and acknowledges that it will provide for the duration of the project, the full complement of staff required to perform the work of the project, including the specific individuals identified in its proposal. These key personnel shall remain assigned for the duration of the project unless otherwise agreed to in writing by the UOI. In the event the proponent wishes to substitute any key personnel, the individual(s) proposed must demonstrate similar qualifications and experience as required, to successfully perform such duties.
- 14.14 Intellectual property and any data associated with this project is the express property of the UOI.