




Innovation, Science and
Economic Development Canada

Innovation, Sciences et
Développement économique Canada

The background of the cover is a photograph of the Aurora Borealis (Northern Lights) in shades of green and blue, dancing over a dark, silhouetted mountain range. A large, semi-transparent blue maple leaf is centered over the image.

2021-2023

APPLICANT'S GUIDE TO SUBMITTING PROPOSALS

FOR THE CONTRIBUTIONS PROGRAM FOR NON-PROFIT
CONSUMER AND VOLUNTARY ORGANIZATIONS



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Section 1 – General Information

1.1 Program Objective

Overview

The Contributions Program for Non-profit Consumer and Voluntary Organizations (the Program) was established by Innovation, Science and Economic Development Canada's (ISED) Office of Consumer Affairs (OCA) to support organizations in the production of high quality, independent and timely research on consumer issues.

Objective

The objective of the Program is to strengthen the consumer's role in the marketplace through the promotion of sound research and analysis, and by encouraging the financial self-sufficiency of consumer and voluntary organizations.

1.2 How to use the Applicant's Guide

The Applicant's Guide provides an overview of the Program and assists in the completion of proposals. Please read all sections of this guide before preparing your proposal.

1.3 Contacting ISED

Should you have any questions, please contact us at:

Office of Consumer Affairs

Telephone: 343-998-7313

Email: ic.oacacontributions-contributionsbc.ic@canada.ca

Section 2 – Program overview

2.1 Eligibility

Who is eligible?

Organizations that are **incorporated as non-profit corporations in Canada** and which can demonstrate that they:

- have a governance structure which assures accountability to a membership representing the consumer interest;



- have a structure, governance and funding arrangements which do not expose them to commercial influence on their research and policy positions;
- are capable of reaching out to Canadian consumers beyond members of the organization itself;
- are competent, credible, and accountable in carrying out the projects; and
- are guided by objectives which are consistent with the objectives of the Program

Who is not eligible?

Individuals, profit-oriented organizations, industry, trade and professional groupings, representatives of business or commercial interests, government departments, agencies and organizations, academic institutions and their associated research agencies, political parties and organizations involved in partisan political activity do not qualify for Program support as well as all other applicants that do not meet the criteria listed above.

What's new?

Enhanced contribution limits, flexible timelines, and new project options. The 2021-2023 call for proposals will span over two years (i.e. April 1, 2021 to March 31, 2023) offering the following options to applicants:

- **One year timeline** with up to \$135,000 per project for proposals not previously funded under the Program. Applicants may submit proposals for one year projects to be undertaken in the first and/or second fiscal year of the project cycle so long as they are completed by March 31, 2023.
- **Two year timeline** with up to \$200,000 per project for proposals not previously funded under the Program.
- **Research “refresher”** with up to \$50,000 per project to update past studies through a “then and now” comparison, examining consumer issues that, for example, are potentially exacerbated by the COVID-19 pandemic.

Considerations

- Timelines over one and two years provide Applicants flexibility to plan



around their short and medium term priorities. Projects may start at any point over the 2021 – 2023 cycle provided it corresponds with the timelines above and the project is completed by March 31, 2023.

- **Contribution limits** have been established so as to support ambitious projects that are national in scope, geographically representative and considerate of Canada's diverse and underrepresented populations. Applicants should consider innovative approaches to their methodology, work plans and, communication efforts. During the assessment process, consideration will be given to proposals that demonstrate these aspects.
- **Proposals are limited to five proposals** per organization – distributed across the different project options as the organization sees fit. A separate application must be submitted for each proposal. Proposals that present alternative approaches for the same project topic will be rejected.
- **Note: Reminder that this call for proposals spans over two years** (i.e. April 1, 2021 to March 31, 2023).

Before submitting a proposal, it is recommended that applicants:

- 1) Review projects currently funded under the Program:
<http://www.ic.gc.ca/eic/site/oca-bc.nsf/eng/ca02974.html>
- 2) Review past projects funded under the Program. This information is located in ISED's Consumer Policy Research Database at:
http://www.ic.gc.ca/eic/site/oca-bc.nsf/eng/h_ca02236.html
- 3) Review the priority **topics of interest** for 2021-23. Applicants should also consider the research refresher option to expand, or update, previously program-funded projects that align with these topics. The topics are:
 - **Digital Consumer Protection:** examples include the impacts of the pandemic on the electronic marketplace; online consumer protection; consumer rights and digital marketing; personalized pricing in Canada (e.g. trends and linkages to privacy and data security); disclosure practices and effectiveness (e.g. about privacy, price, policies, etc.), privacy (e.g. trade-offs involved in the personalization of services, generation-specific attitudes to privacy);
 - **Systemic Barriers and Other Risks to Vulnerable Consumers:** examples include the accessibility of trusted sources of information; impacts of COVID-19 on vulnerable consumers; food security in Canada, and the impact of the pandemic; the role of accessible technologies in digital consumer protection;



- **Sustainable Consumption:** examples include ownership vs sharing or leasing of products (e.g. Circular Economy); right to repair (e.g. importance of repairability in decision making); sustainable consumption before, during, and (post) pandemic; what areas can consumers have the greatest impact on sustainability; charging infrastructure for zero emission vehicles;
- **Consumers and the Financial Sector:** examples include consumer awareness of, and access to, programs related to debt repayment; online and high cost lending products; financial advice (where consumers get advice, consumers' impression of that advice);
- **Emerging issues due to COVID-19:** examples include the effects of the pandemic on consumer behaviours; delivery charges for online ordering; use of travel vouchers versus refunds; how airlines are addressing consumers complaints in cases of flight cancellations/changes; consumers and PPE/healthcare products.

Applicants may also submit proposals on other relevant consumer issues provided they can demonstrate its importance. Priority will be given to proposals that align to the topics of interest outlined above.

2.2 Funding and project types

The Program funds projects through non-repayable contributions. There are two funding streams under the Program; Research Projects and Development Projects.

2.3 Research Project Stream

The purpose of Research Project contributions is to improve the capacity of consumer organizations to represent the interests of consumers in the marketplace decision-making process through sound research and analysis of consumer protection issues that are national in scope including: marketplace failure; consumer information; choice; representation; redress; safety; contractual transactions; and issues relating to institutional, legislative, regulatory and voluntary frameworks. For a list of the 2021-23 topics of interest, consult [Section 2.1](#) of the Applicant's Guide.

Please note that research projects aimed at supporting educational activities, conferences, workshops, exhibitions and promotional materials, magazines, guides, folders, web sites, training programs and the like are not eligible.



2.4 Development Project Stream

Development Projects are aimed at capacity building for consumer organizations. They fall into two categories:

- **Organizational Development Projects** aim to strengthen an organization's capacity to diversify revenue sources and increase its level of self-sufficiency. Projects may include preparation of **multi-year business plans, feasibility studies** (including online services) and **market analyses**, or **pilot projects** for developing and producing products or services with the potential to generate long-term revenues for the organization, or increase its visibility and/or the membership base.
- **Consumer Movement Development Projects** aim to strengthen organizations' capacity to **work collaboratively** in the interest of Canadian consumers by developing joint plans and initiatives in the areas of policy research, analysis and development; by creating and implementing action plans to address issues of national concern; by making concerted international representations; and by establishing joint representation and communication initiatives with the public, with government, and with industry.

2.5 Program budget allocations

The total annual Program budget is \$1,690,000 and the **maximum total amount** that can be awarded to a single organization in any given fiscal year is **\$500,000**.

This year's call for proposals will continue to be available over two fiscal years (i.e. April 1, 2021 to March 31, 2023) offering the following flexible options to Applicants:

One year timeline with up to \$135,000 per project for project topics or concepts not previously funded under the Program. Applicants may submit proposals for one year projects to be undertaken in the first and/or second fiscal year of the project cycle so long as they are completed by March 31, 2023.

Two year timeline with up to \$200,000 per project for project topics or concepts not previously funded under the Program.

Research “refresher” of up to \$50,000 per project to update past studies through a “then and now” comparison, examining consumer issues that, for example, are potentially exacerbated by the COVID-19 pandemic.



Note: Please refer to [section 2.1](#) under “What’s New” for Program timelines, contribution amounts, and application limits. Applicants should be diligent when developing proposal timeframe(s) and budget(s).

When selecting from the various options, applicants should consider operational capacity and available resources. In the event that additional funds were to become available, the program would seek to launch an additional call for proposals in 2021 possibly causing project overlap for organizations in receipt of 2021-23 funding.

2.6 Project Duration

Projects can span a period of up to 24 months. The fiscal project cycle will begin April 1, 2021 and end March 31, 2023. Projects may start at any point over the 2021 – 2023 cycle but must be completed by March 31, 2023. Applicants can select timelines outside the one or two year timeframe (e.g. 9 months or 18 months), however the contribution amount requested must be reflected accordingly.

Section 3 - Preparing a proposal

Proposals are to be submitted electronically to ISED via the Portable Document Format (PDF) application form’s “Submit” button.

A link to the PDF application form is available on the ISED website:

http://www.ic.gc.ca/eic/site/oca-bc.nsf/eng/h_ca00175.html

Important information on using the application form:

- Make sure you have the latest version of a PDF reader. To view and download the application form, you must have a PDF reader installed. If you do not already have such a reader, the following ones are available to download free of charge:
 - Adobe Reader - <http://get.adobe.com/reader/otherversions/>
 - Foxit Reader - http://www.foxitsoftware.com/Secure_PDF_Reader/
 - Xpdf - <http://www.foolabs.com/xpdf/download.html>
 - eXPert PDF Reader - <http://www.visagesoft.com/products/pdfreader/>
- How to access and download the application form:
 - Go to the following website: http://www.ic.gc.ca/eic/site/oca-bc.nsf/eng/h_ca00175.html
 - Right click on the link to the PDF document and select “Save Target



As" (Internet Explorer) / Save Link As (Firefox) from the drop-down menu.

- Save the file to a directory on your computer by clicking "Save".
- **Saving your proposal:** The application form allows you to save the draft proposal so you can return to it at a later time. Once your proposal is complete, you should print a copy for your records and then submit to ISSED.
- **Multiple proposals:** The application form has a feature that allows you to clear the "Proposal" section in Step 3 of an already completed proposal, while retaining all of the information from Steps 1 and 2. Start by re-saving the completed application form with a different name. You can then clear the proposal section by using the "Reset" button and prepare another proposal using the same application form.
- **Proposals have a maximum character length:** Each question in the application form will display a maximum number of characters allowed. Please note that spaces and hard returns are counted as characters and add to the total number of characters.
- **Active Internet connection:** You need to be connected to the Internet in order to submit an application form to ISSED.

Note: Although you must be connected to the Internet to submit your proposal to ISSED, you can edit and complete the application form offline using your PDF reader software.

Submit early: It is strongly recommended that you submit your proposal early. When approaching the deadline, please allow **at least 1 hour** for submission **prior to the closing deadline** to account for any unforeseen transmission delays. The intake system closes automatically and late proposals will not be accepted.

3.1 Application form submission requirements

This section is an overview of Steps 1 to 3 only of the application form. The questions for the three projects types have been provided as annexes (1-3) to this Applicant's Guide.

Step 1 – Eligibility criteria

This section is designed to help applicants self-assess eligibility for funding under the Program. Once this step is completed and validated, then you will be able to proceed to Step 2 - Organization information.



Please refer to [Section 2.1](#) of the Applicant's Guide for the eligibility criteria.

Step 2 – Organization information

This section requires the applicant's contact information, membership and donor information, and publications details (e.g. magazine, newsletter or blog).

The applicant must provide supporting documentation. If you do not currently have electronic versions of the required supporting documentation (budget forecast, lobbyist declaration, etc.) you may scan the hard copies and attach them. The following image formats are accepted: BMP, JPEG, PDF and GIF.

Use the "+" and "-" buttons to add or remove an information line. If you have multiple items and want to change the order in which they appear, you can use the arrows (▲ ▼) to move them.

The applicant must answer the following **declarations**. If the answer is "Yes" to one or more of the following declarations, supporting document(s) will be required:

- **Lobbying Act:** in your organization, do you presently employ persons to lobby on your behalf? If yes, please provide assurance that, where lobbyists are used, they are registered in accordance with the *Lobbying Act* and that no actual or potential conflict of interest exists nor any contingency fee arrangement.
- **Values and Ethics Code for the Public Service:** in your organization or on your Board of Directors, do you presently employ a former public servant who left the federal government in the last twelve months? If yes, please provide assurance that the public servant is in compliance with the *Values and Ethics Code for the Public Service*.
- **Conflict of Interest Act:** in your organization or on your Board of Directors, do you presently employ a former public office holder who left the federal government in the last twelve months? If yes, please provide assurance that the public office holder is in compliance with the *Conflict of Interest Act*.

In Question #20 of the application form, applicants are required to **attach** the following **six documents** in order to proceed:

- statement of incorporation (i.e. proof of provincial or federal non-profit incorporation, or both, if applicable);
- the latest audited financial statement* prepared by a Chartered Accountant which comprise the organization's statement of financial



- position as at March 31, 2020 or at the Organization's end of its most recent financial fiscal year (i.e. independent auditor's report);
- the Organization current fiscal year budget forecast;
- a background statement on the organization's aims, objectives and structure;
- the list of the current Board of Directors members; and
- the organization's current by-laws.

The audit provides reasonable assurance that the entity's financial statements present fairly its financial position, financial performance and its cash flows in accordance with the applicable financial reporting framework (Chartered Accountants of Canada. *Understanding Reports On Financial Statements*. Available online at: <https://www.cpacanada.ca>.)

The maximum file size accommodated on the network is **10 MB**. To ensure that the uploading process runs smoothly, please click "Save" after attaching each file.

Ensure that all required documents have been attached to the application form. To display a list of your attachments, click the paperclip icon on the left side of the application form.

Step 3 – Types of projects

Select proposal type

One type of proposal must be selected: Research, Organizational Development or Consumer Movement. The questions in the application form are based on the type of proposal selected.

Applicants should clearly indicate in the Project Summary box (Section B of the application form) which of the options they are applying for (i.e. one-year timeline, two-year timeline or Research refresher).

Once this section has been completed applicants may submit **up to a maximum of five** proposals.

3.2 Application deadline

Applicants have until **3 pm EST, January 29, 2021**, to submit their applications. Please submit proposals via the Applicant Form online. If this method of transmission poses any issues, please notify ISED as soon as possible (contact information in [Section 1.3](#)). The online submission system closes automatically and will decline any late proposals. Incomplete proposals will not be assessed.



3.3 Confirmation of receipt

Once the proposal has been successfully submitted using the “Submit” button, a confirmation is displayed on the screen. It is recommended applicants keep a copy of the confirmation document for their own records. If a confirmation page is not displayed, there might have been a problem successfully submitting the proposal.

If a problem occurs during submission, verify that all the required documentation is attached (and that they do not exceed the combined maximum file size of **10 MB**) and that all fields have been completed. Any concerns, should be flagged to ISED **before the closing deadline** to ensure the proposal has been submitted successfully. See [Section 1.3](#) for details on contacting ISED.

Section 4 - Eligible costs for projects

Eligible costs for contributions are costs that are incurred by the recipient and which, in the opinion of the Minister, are reasonable to carry out the eligible activities.

There are two categories of eligible costs: Part A and Part B. Eligible costs listed under Part A are considered to be direct costs chargeable to the project. **Eligible costs listed under Part B can be claimed for research projects only**, and are comprised of indirect costs. A maximum of 15 percent (15%) of the total eligible costs for the project can be comprised of overhead expenses.

4.1 Part A – Direct project costs for Research and Development Projects

These include:

- Direct labour and salaries (salaries and benefits of employees working on the project);
- Subcontract and consultants (research, data collection, surveys, discussion groups, special assistance, contract employees, etc. – please clearly identify the type of service, and the name of the contractor, if available);
- Direct materials (includes office supplies, printing, postage); and
- Other (can include accounting for bookkeeping and audit fees relative to the contribution only,) travel expenses related to the project, translation fees, methodology review of project results and final report, communication activities, etc.)



4.2 Part B – Indirect costs (Research Projects only)

These include:

- Overhead (rent and utilities - office rental, hydro, heat, telephone, etc.);
- Equipment (rental of office equipment related to the project may include computer equipment); and
- Other (related to project's objective only; can include liability insurance).

Section 5 – Assessment

As part of a competitive process, all proposals are reviewed and assessed in accordance with the general Program objective, eligibility requirements, funding sought for the project type and, quality of the overall proposal. The following section provides an overview of how proposals are assessed, the assessment questions, and weighted scoring for each question.

5.1 Assessment criteria

ISED assesses **research project** proposals for:

- the timeliness and relevance of the consumer issue;
- feasibility of the methodology and work plan;
- capability of the research team; and
- communications efforts on distribution of project results and final report.

Organizational development project proposals are assessed on:

- the ability of the organization to reach greater financial self-sufficiency;
- feasibility of the work plan;
- capability of the project team to carry out the project and objectives; and
- how it will assist the organization to fulfil its mandate.

Consumer movement development project proposals are assessed on:

- the organization's capacity to work collaboratively on policies to represent the best interest of Canadian consumers;
- feasibility of the work plan;
- capability of the project team to carry out the project and objectives;



- communications efforts on distribution of project results and final report.

5.2 How Proposals are assessed

Each proposal is scored on a total of 100 points and ranked accordingly (see Annexes 1-3 of the Applicant's Guide for details on the amount of points allocated to each question). Proposals are assessed on a competitive basis and are reviewed in accordance with the Program's objective as well as the appropriate eligibility criteria. Please consult the annexes below to learn more about assessment criteria and scoring.

In making final recommendations for funding, the Government of Canada reserves the right to give higher consideration to those proposals that include factors such as: broader geographical representation and [Gender-Based Analysis+](#) to ensure research reflects impacts to Canada's diverse populations and demographics; the 2021-23 topics of interest; and the communication efforts of project results.

For more information on Gender-Based Analysis+, please visit the Status of Women website at: <https://www.swc-cfc.gc.ca/gba-acis/index-en.html>

The assessment process comprises the following steps and factors:

- Applicants are subject to an eligibility assessment to ensure they are eligible under the Program. If an applicant fails to meet the eligibility criteria the applicant will be notified and their proposal(s) will not be considered.
- All proposals are assessed by ISED policy analysts, and other relevant departments and agencies as appropriate. Analysts from provincial and territorial consumer protection bodies may also be called upon for their assessment of proposals within their jurisdiction and area of jurisdiction.
- Proposals dealing with financial issues are assessed by representatives from the Financial Consumer Agency of Canada and ISED.
- Proposals are assessed according to the overall assessment criteria laid out in [Section 5.1](#).
- The assessments of all proposals, as well as specific comments from the evaluators, are reviewed by the OCA who will make funding recommendations.
- Applicants will be notified of the status of their proposals once the competitive assessment process is complete.



Annex 1 – Research Project questions included in the application form

All questions are mandatory

Other requested source(s) of funding:

Applicant must identify all sources of funding related to the proposal (or similar topic) being submitted for consideration under the OCA Contributions Program. This includes project funding with any other federal, provincial or territorial government department or agency, applicants must provide the name of the source, current status, date requested, full amount as well as the project title for the proposal submitted.

A - The applicant

- Completed by (name of the individual):
- Telephone:
- Email:

B - Project summary

Provide a concise description of the project. This summary will be used to formulate the contribution agreement, if the proposal is funded. The description should include:

- Research to be undertaken (including consumer issues to be addressed)*;
- Summary of key project tasks and milestones;
- Expected outcomes of this project*;
- Brief description of the methodology and techniques to be used; and
- Summary of communication strategy to promote the research results/recommendations to the selected target audiences.

Maximum of 4000 characters (approximately one page).

Ensure the research to be undertaken (including the consumer issues to be addressed) and the expected outcomes of the project are clear. A chance to elaborate on the other components is provided in other sections of the application form.



C - The proposal

All proposals will be assessed based on the completeness, quality, and content of your responses to each question below. Insufficient or poorly drafted responses will result in low overall assessment scores. Referring to an external link/page will not be considered a complete answer.

1. Importance of the Consumer Issue: Describe the importance of the consumer issue, with evidence (e.g. consumer complaints, media coverage, statistical or anecdotal data, other policy or regulatory/legislative developments, etc.).

Maximum of 2000 characters (approximately half of page). 10 points

Ensure the description provided on consumer issue's scope and/or current or potential impact on consumers is clear as this is a key element of the assessment. The Government of Canada reserves the right to give higher consideration to the proposals that include factors such: as geographical representation and [Gender-Based Analysis+](#) to ensure research reflects impacts to Canada's diverse populations and demographics; and, that tie into the Government of Canada's priorities and/or the topics of interest for 2021-2023:

- **Digital Consumer Protection:** examples include the impacts of the pandemic on the electronic marketplace; online consumer protection; consumer rights and digital marketing; personalized pricing in Canada (e.g. trends and linkages to privacy and data security); disclosure practices and effectiveness (e.g. about privacy, price, policies, etc.), privacy (e.g. trade-offs involved in the personalization of services, generation-specific attitudes to privacy);
- **Systemic Barriers and Other Risks to Vulnerable Consumers:** examples include the accessibility of trusted sources of information; impacts of COVID-19 on vulnerable consumers; food security in Canada, and the impact of the pandemic; the role of accessible technologies in digital consumer protection;
- **Sustainable Consumption:** examples include ownership vs sharing or leasing of products (e.g. Circular Economy); right to repair (e.g. importance of reparability in decision making); sustainable consumption before, during, and (post) pandemic; what areas can consumers have the greatest impact on sustainability; charging infrastructure for zero emission vehicles;
- **Consumers and the Financial Sector:** examples include consumer



awareness of, and access to, programs related to debt repayment; online and high cost lending products; financial advice (where consumers get advice, consumers' impression of that advice); how environmental and social responsibility influence consumer behaviour in banking;

- **Emerging issues due to COVID-19:** examples include the effects of the pandemic on consumer behaviours; delivery charges for online ordering; use of travel vouchers versus refunds; how airlines are addressing consumers complaints in cases of flight cancellations/changes; consumers and PPE/healthcare products.

2. Timeliness of the Consumer Issue: Indicate why it is important to study the described consumer issue at this time, in terms of its scope or impact, current or potential (e.g., the issue affects a large number of consumers, involves substantial harm to consumers or addresses an important marketplace failure, etc.).

Maximum of 2000 characters (approximately half a page). 5 points

Include how the consumer issue could be used to support policy-making. For example, will the project results be available in time to input into decision making processes (legislative, regulatory, task force, consultation, etc.)?

This answer will be assessed based on the importance and timeliness of the consumer issue and how it will support consumer education, protection, or awareness on current/ongoing/or potential consumer issues.

3. Summary of Supporting Research: Provide a list or summary of relevant existing research on the issue. Projects proposing a literature survey as a component should include a description of the sources that would be used (be as specific as possible) and evidence of an initial scan to confirm the existence of relevant sources.

Maximum of 4000 characters (approximately one page). 5 points

Ensure the summary provided is clear and concise with existing research on the consumer issue identified as this is a key element of the assessment. Alternatively, if it is an emerging issue, it will be assessed on how the applicant demonstrates that no previous relevant research exists by academics, consumer organizations, government, or industry on the consumer issue from the consumer perspective. Higher scores will be allotted to academic supported research.



4. Value of Proposed Research: Explain how your proposal will add to said body of knowledge (demonstrate the value that your proposed research would provide over existing research).

Maximum of 2000 characters (approximately half a page). 5 points

This answer will be assessed on how well it explains and demonstrates how the project results will enhance relevant previous research work of academics, consumer organizations, and, or government and industry on this issue. If this is a new emerging consumer issue, the answer provided should demonstrate that no relevant previous research done on the consumer issue exists, and that the proposed research opens a new field of research and area of expertise.

5. Identification of Stakeholders: Identify the relevant stakeholders and key informants who will participate and/or be consulted to provide expertise/views on the issue proposed in this proposal. Also, please identify the stakeholders who were contacted and the stakeholders to be consulted during this project. If contact with a stakeholder has not been made yet, indicate when it will be done and indicate what impact non-participation by a stakeholder will have on the project.

Maximum of 4000 characters (approximately one page). 10 points

This answer will be assessed based on completeness and relevancy of the identification of stakeholders in relation to the consumer issue.

6. Research Questions: Please formulate concisely the research question and sub-questions to be answered by your methodology and that your research project seeks to answer.

Maximum of 2000 characters (approximately a page). 10 points

This answer will be assessed on the relevancy of the research questions to be addressed and answered by the research project in depth in relation to the consumer issue.

7. Methodology: What is the proposed methodological approach for this project? Demonstrate that it is feasible and that it will address the research question/sub questions articulated in Question #6. Provide details on each of the methods to be employed and note whether you will require external resources such as consultants or survey firms to assist or lead this task.

Each category selected has a maximum of 1000 characters, 20 points



There are separate categories for each methodological approach. Applicants may select as many as required and, at least one method must be selected. For each category, clearly describe the objective, and if applicable, the type/number of participants to be involved, demographics, and geographic regions. Ensure to indicate if the methodological approach will require external resources as indicated in the question. As a reminder, research projects and analysis is directed at consumer protection issues which are national in scope. As such, the methodological approaches should be geographically representative and consider Canada's diverse population. If you are doing surveys or focus groups, ensure that they are representative of Canada's official languages communities.

This answer assesses the feasibility of how the methodological approaches will address the research question and consumer issue in order to produce a quality report. In making final recommendations for funding, the Government of Canada reserves the right to give higher consideration to those proposals that include factors such as: as geographical representation and [Gender-Based Analysis+](#) to ensure research reflects impacts to Canada's diverse populations and demographics.

8. Work plan: Provide a detailed work plan, which lists the key milestones and the sequence of tasks necessary to implement the methodology and produce relevant project outcomes. This information must be presented by quarter.

Maximum of 4000 characters (approximately one page). 5 points

The work plan will be assessed on how clearly it presents in detail the required actions and the chronological sequence to be undertaken to thoroughly implement the methodology and produce relevant project outcomes.

9. Research Team and Expertise: Please identify the individual names of those who will be working on this project and how their expertise relates to this project. Demonstrate that the project research team is qualified and capable of producing quality work. Also indicate when external contractors will be used to perform certain tasks and provide details (e.g. name, firm name, etc.), when available.

Example: "Mr. A. Person will lead the research team; he is a consumer advocate of long standing, and led research on (related topic) resulting in representations before the XX Committee. He led and wrote research papers on XXX and participated in initiative X on X topics. A contractor with specific public opinion



research expertise will be hired to design, conduct, and analyze a survey/focus groups.”

Maximum of 4000 characters (approximately one page). 10 points

The research team and expertise will be assessed on their qualifications and extensive research experience in the research area, as well as their experience writing research papers and policy-oriented documents.

10. Communication Strategy: Provide a preliminary communications plan for this project that clearly outlines how you will use the project results and provide details on how you will communicate the research findings for this project. Please include stakeholders and target audiences, tactics to be used in a communications approach and how you will evaluate and report metrics to be used as success indicators.

Please use the following headlines to respond to the question:

- **Target audience of your project results:** please identify all the relevant stakeholders who you will approach to communicate your research results;
- **Communication tactics and channels used to diffuse project results:** outline all tactics to be used such as posting the final report on your website, alerts on social media, direct distribution of final reports to stakeholders, speaking engagements to share results, presentations at various events (conferences, seminars, presentations, etc.), results presented or references at parliamentary committees, announcing the results at a press conference, news release on your website and in mainstream media, etc.;
- **Timelines of communication tactics:** identify when the communication / dissemination activities will take place; and
- **Evaluation and tracking of results:** how will you track and evaluate the results of your project? For example, media monitoring, website statistics, tracking of reports shared with decision-makers, invitations to conferences / meetings, etc.

Maximum of 4000 characters (approximately one page). 10 points

Ensure the answer provided is developed using the proposed headlines. Failure to use the headlines could result in lower scores. This answer will assess how well the communication strategy is detailed, the types of communication activities to be carried-out, how and when they will be disseminated to inform relevant



stakeholders and target audiences of projects results and final report. It is expected that recipients will track and be able to report on results.

11. Project Costs: Provide the projected costs required to undertake the project in the budget template. No other document will be accepted. Also, provide details of project costs/resources committed to the project by your organization or by other individuals or organizations in addition to the amount requested under the Program. Both direct and indirect costs are acceptable for research projects. Up to 15 percent of the total eligible costs supported can be comprised of indirect expenses.

The budget template is included in the application form. 10 points

For a list of eligible costs see [Section 4](#) of the Applicant's Guide.

Provide details for expenses when possible. For example, if any contracts for services will be required for your projects, please clearly identify them (contractor's name, if available, and per diem, if relevant).

NOTE: For projects with a projected time frame of longer than 12 months, two separate budget grids will be required – one for each fiscal year. Year 1 is from April 1, 2021, to March 31, 2022, and Year 2 is from April 1, 2022, to March 31, 2023. If you are submitting multiple proposals, remember that an organization may receive up to a maximum of \$500,000 per fiscal year.

If your project is less than 12 months but spans over two fiscal years, two separate budget grids will also be required.

Please ensure the total amount requested from the Minister does not exceed \$200,000 with both budget grids combined. Avoid the use of cents in your cost estimate(s). Either round up or down to the nearest dollar.

Use the “+” and “-” buttons to add or remove a text field associated to each of the cost categories. If you have multiple items and want to change the order in which they appear, you can use the arrows (▲ ▼) to arrange them.

The project costs will be assessed on how the budget breakdown supports the work plan and clearly outlines all the funds required to undertake project activities



Annex 2 – Organizational Development questions included in the application form

All questions are mandatory.

Other requested source(s) of funding:

Applicant must identify all sources of funding related to the proposal (or similar topic) being submitted for consideration under the OCA Contributions Program. This includes project funding with any other federal, provincial or territorial government department or agency, applicants must provide the name of the source, current status, date requested, full amount as well as the project title for the proposal submitted.

A - The applicant

- Completed by (name of the individual):
- Telephone:
- Email:

B - Project summary

Provide a concise description of the project. This summary will be used to formulate the contribution agreement, if the proposal is funded. The description should include:

- Activity to be undertaken
- Expected outcomes
- Summary of key project tasks and milestones
- Summary of communication efforts

Maximum of 4000 characters (approximately one page).

Ensure the activity to be undertaken and the expected outcomes of the project are clear. A chance to elaborate on the other components is provided in other sections of the application form.

C - The Proposal

Please select a type of Organizational Development Project:

- Pilot Project
- Feasibility Study
- Market analyses
- Multi-Year Business Plans



1. How and why will undertaking this project increase the organization's ability to:

- Better fulfill its mandate? and/or
- Increase its visibility and membership? and/or
- Reach greater self-sufficiency?

Explain why undertaking this activity will help your organization reach its long term self-sufficiency strategy. If funds are requested to undertake a feasibility study, please justify why the product or service was selected for the feasibility study (Was it identified in your business plan as a potential source of revenue? What makes you think it has revenue potential? etc.). If funds are requested for a pilot project, please demonstrate the viability of the product or service under consideration (e.g. feasibility study, analysis of demand, projection of costs and revenues).

Maximum of 8000 characters (approximately two pages). 20 points

The answer will be assessed on the evidence provided to support that the development activity to be undertaken (pilot project, feasibility study or multi-year business plans) will help the organization reach its long term self-sufficiency strategy.

2. Provide a detailed work plan which clearly presents the required actions to be undertaken, key milestones, and the project's time frame. Are they reasonable for the scope of the project? Provide a quarterly breakdown of project work, and demonstrate how project work will make it possible for the organization to increase its membership capacity and/or reach greater self-sufficiency.

Maximum of 4000 characters (approximately one page). 20 points

The work plan will be assessed on how clearly it presents in detail the required actions and the chronological sequence to be undertaken to thoroughly implement the project and produce expected project outcomes.

3. Why is it important to undertake this development activity? Why at this time? Is it part of your business plan / long term self-sufficiency strategy? Clearly demonstrate why undertaking this activity at this time is part of your organization's overall self-sufficiency strategy and business plan.



Maximum of 4000 characters (approximately one page). 20 points

The answer will be assessed on the evidence provided on the importance and timeliness of undertaking the development activity and how it supports the organization's self-sufficiency strategy.

4. Who will actually be doing the work? What are the qualifications of the project team to undertake this work and reach project objectives? Who in your staff or which consultant will do the project work and write the report? Why were they selected? Please provide the name(s) of the person(s); and, a brief description of their qualifications to undertake such work. Be prepared to provide recent previous examples of their work upon request.

Maximum of 4000 characters (approximately one page). 20 points

The project team will be assessed on their qualifications and experience in the development activity to be undertaken as well as their proven ability to reach the project objectives.

5. Provide the projected costs required to undertake the project

Provide the projected costs required to undertake the project in the budget template. Also provide details of project costs/resources committed to the project by your organization or by other individuals or organizations in addition to the amount requested under the Program. Note that Development contributions are provided only for direct costs associated with the development related activities.

The budget template is included in the application form. 10 points

For a list of eligible costs see [Section 4](#) of the Applicant's Guide.

The project costs will be assessed on how the budget breakdown supports the work plan and clearly outlines all the funds required to undertake project activities.

NOTE: For projects with a projected time frame of longer than 12 months, two separate budget grids will be required – one for each fiscal year. Year 1 is from April 1, 2021, to March 31, 2022, and Year 2 is from April 1, 2022, to March 31, 2023. If you are submitting multiple proposals, remember that an organization may receive up to a maximum of \$500,000 per fiscal year.

If your project is less than 12 months but spans over two fiscal years, two separate budget grids will also be required.



Please ensure the total amount requested from the Minister does not exceed \$200,000 with both budget grids combined. Avoid the use of cents in your cost estimate(s). Either round up or down to the nearest dollar.

6. Provide an external and/or internal communications plan for this project with clear measurable objectives.

Maximum of 4000 characters (approximately one page). 10 points

The communication plan will be assessed on the clear measurable objectives provided and how it will make it possible for the organization to increase its membership capacity and/or reach greater self-sufficiency.



Annex 3 – Consumer Movement

Development questions included in the Application Form

All questions are mandatory.

Other requested source(s) of funding:

Applicant must identify all sources of funding related to the proposal (or similar topic) being submitted for consideration under the OCA Contributions Program. This includes project funding with any other federal, provincial or territorial government department or agency, applicants must provide the name of the source, current status, date requested, full amount as well as the project title for the proposal submitted.

A - The Applicant

- Sponsoring consumer organizations
- Lead organization that will administer the contribution agreement:
- Completed by:
- Telephone:
- Email:

B - Project Summary

Provide a concise description of the project. This summary will be used to formulate the contribution agreement, if the proposal is funded. The description should include:

- Activity to be undertaken (including roles of key organizations)
- Expected outcomes
- Summary of key project tasks and milestones
- Summary of communication efforts

Maximum of 4000 characters (approximately one page).

Ensure the activity to be undertaken (including roles of key organizations) and the expected outcomes of the project are clear. A chance to elaborate on the other components is provided in other sections of the Application Form.



C - The Proposal

1. How will undertaking this project strengthen the Canadian consumer movement? Why? Explain why it is important for the Canadian consumer movement that the participating organizations work collaboratively on this issue, collaborative structure, etc.

Maximum of 4000 characters (approximately one page). 20 points

The answer will be assessed on the evidence provided on how and why the project will strengthen the Canadian consumer movement. Ensure the answer clearly describes why collaborative work is important to achieve the expected outcome. For example, do the collaborating organizations have two different expertise that are both essential to the outcome of the project?

2. Why is it important for the Canadian consumer movement that participating organizations work collaboratively on this issue at this time? What event, regulatory review, etc. justifies investing time and money to address the issue collectively, undertake a common communication strategy, etc.?

Maximum of 4000 characters (approximately one page). 20 points

The answer will be assessed on the evidence provided on the importance and timeliness of undertaking the consumer movement collaboratively, and how it will support a specific event (regulatory review, consultation etc.).

3. Which organization or organizations will have the lead, provide financial management, and accountability? What will be the contributions of each of the organizations participating in this project? How were they chosen? Why is their participation essential? Who will do the project work (among the sponsoring organizations, and/or outside participants or consultants)? Demonstrate that there is a structure to provide project direction, financial management and accountability. Demonstrate that participating organizations have the expertise required to address the issue and the capacity to work together to reach project objectives. Were the right organizations selected? Please provide the name(s) of the person(s); and, a brief description of their qualifications to undertake such work. Be prepared to provide upon request recent previous examples of their work.

Maximum of 8000 characters (approximately two pages). 20 points



The answer will be assessed on the evidence provided that there is a structure to provide project direction, financial management and accountability, that participating organizations have the expertise required to address the issue and the capacity to work together to reach project objectives, and that the appropriate organizations were selected. The project team will be assessed on their qualifications, experience and ability to undertake such work to reach the project objectives.

4. Provide a detailed work plan which clearly presents the required actions to be undertaken, key milestones, and the project's time frame. Are they reasonable for the scope of the project?

Maximum of 4000 characters (approximately one page). 20 points

The work plan will be assessed on how clearly it presents in detail the required actions, key milestones and the project time frame relative to the scope of the project.

5. Provide a communications plan for this project with clear measurable objectives and demonstrate how this plan will strengthen the consumer movement in Canada.

Maximum of 4000 characters (approximately one page). 10 points

The communications plan will be assessed on the clear measurable objectives provided and how it will strengthen the consumer movement in Canada.

6. Provide the projected costs required to undertake the project in the budget template*. No other document will be accepted. Also provide details of project costs/resources committed to the project by your organization or by other individuals or organizations in addition to the amount requested under the Program. Note that Development contributions are provided only for direct costs associated with the development-related activities.

The budget template is included in the Application Form. 10 points

For a list of eligible costs see [Section 4](#) of the Applicant's Guide.



The project costs will be assessed on how the budget breakdown supports the work plan and clearly outlines all the funds required to undertake project activities.

NOTE: For projects with a projected time frame of longer than 12 months, two separate budget grids will be required – one for each fiscal year. Year 1 is from April 1, 2021, to March 31, 2022, and Year 2 is from April 1, 2022, to March 31, 2023. If you are submitting multiple proposals, remember that an organization may receive up to a maximum of \$500,000 per fiscal year.

If your project is less than 12 months but spans over two fiscal years, two separate budget grids will also be required.

Please ensure the total amount requested from the Minister does not exceed \$200,000 with both budget grids combined. Avoid the use of cents in your cost estimate(s). Either round up or down to the nearest dollar.



Annex 4 – Frequently asked questions

How can I access and download the application form?

Please consult [Section 3](#) of the Applicant's Guide.

What should I put in the Membership Information section?

This section requires applicants to enter their membership details. For example, does the organization have individual, institutional or academic members? If so, identify each category of members along with their respective fees (membership fee per year) and how many members are in this category.

I attached all the required documentation but I get an error message asking me to check the size of my attachments. What should I do?

It is possible that the maximum file size limit was exceeded. Ensure the combined file sizes uploaded in Step 2 is **less than 10 MB**.

I cannot view the attachments which I attached in the application form. How can I see them?

To display a list of attachments, click the paperclip icon on the left side of the application form.

How can I ensure my proposal was received by ISED if I did not receive a confirmation page?

A confirmation is displayed on the screen right after the "Submit" button has been pressed on the application form. If a confirmation message is not displayed, try to resubmit. If this problem persists there is a strong possibility that the proposal was not received. Contact ISED via email at ic.ocacontributions-contributionsbc.ic@canada.ca or by phone at 343-998-7313.

When I paste content into a text box in the PDF application form, the text cuts off. Why?

All fields in the application form have a maximum character length which is displayed in each question. The character count feature takes into account all spaces and hidden characters, including hard returns. If text is being inputted from a word processing file (e.g. Microsoft Word, Notepad, etc.) and there is a difference between the application form and the one included in the word processing document, the application form's count will prevail. It is always a good practice to remove unwanted spaces as this can help lower the character count.



I have encountered problems opening the application form. How can I access it?

When I try to open the application form with **Safari** as the browser, a new screen opens and displays a message saying "Please Wait" indicating that my PDF viewer may not be able to display the content. What do I do?

- Move the mouse to the bottom-middle on the page, a new menu with four icons will appear that provides the option to save it and download it to your computer.

When I try to open the application form using **Chrome** as the browser, a new screen opens and displays a message saying "Please Wait" indicating that my PDF viewer may not be able to display the content. What do I do?

- Move the mouse to the bottom-right on the page, a new menu with six icons will appear that provides the option to save it and download it to your computer.

When trying to open application form using **Firefox** and/or **Opera** as the browser, a pop-up window will be displayed asking to Open or to Save (download) the form to your computer.

- Please choose the option that is most convenient for you.