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Request for Proposals: Equity Participation Toolkit

SUBMISSION INSTRUCTIONS

You are invited to submit a proposal to develop a practical guide for First Nations considering equity ownership.

REQUEST FOR FACILITATOR PROPOSALS

Submission Deadline: **December 15th, 2026, at 1:00 PM** Eastern Standard Time (EST)

Legal Name:	
Address:	
Telephone Number:	
Facsimile Number:	
Email Address:	

Send Proposal to:

Economic Development Sector, ATTN TO: Director of Economic Development, Arvind Sharma
Chiefs of Ontario
468 Queen St. E - Suite 400
Toronto, ON M5A 1T7
Email: Arvind.sharma@coo.org and cc: Jey.Pakeerathan@coo.org

A proposal must be submitted via e-mail to Arvind.Sharma@coo.org. The proposal must be received by Chiefs of Ontario no later than the deadline date. A proposal submitted in any other manner or late may be disqualified.

The proposal shall be irrevocably open for acceptance and binding on the Facilitator for thirty (30) days after the Submission Deadline date.

The interested candidate's proposal must include the following:

- A demonstration of their expertise in addressing issues related to First Nations economic development

- Knowledge of First Nations equity project intricacies
- Experience creating toolkits and tools for First Nations Leadership and technicians

BACKGROUND AND CONTEXT

Chiefs of Ontario, (COO) Chiefs Committee on Economic Development have discussed the importance of the recent rise of equity ownership in numerous projects, specifically in energy. In line with COO goals on supporting First Nations economic prosperity, there is a need for a relevant toolkit to advance an equity ownership venture.

This request for proposal will be for a consultant to create a relevant toolkit of resources for First Nations to build capacity for informed participation in project negotiations with the goal of equity stake.

OBJECTIVES:

The Consultant will work to complete the following objectives:

1. **Research on Current First Nations Equity Participation Models:** the consultant will document successful examples of First Nations equity participation models across Canada and provide takeaways that could be applied in future negotiations.

2. **Drafting of toolkit:** the consultant will draft a toolkit which will develop tools for governance readiness, financial readiness and technical readiness assessment for First Nations looking for equity participation in Major Projects. Consultants will provide decision-making tools and assessment frameworks, develop templates and checklists for communities to use. The document will introduce Equity Participation, understanding for FNs on Major Projects, equity structures, financial vehicles for Equity participation, due diligence as to legal, finance, environmental impact and technical complexities.

KEY DELIVERABLES AND WORK PLAN

Deliverables	Project Activities	Completion Date
Research on Current First Nations Equity Participation Models	Collect research and data on current First Nations equity participation models across Canada and identify takeaways that would be useful for First Nations communities	2 weeks after start of project

Creation of Equity Participation Toolkit	Draft a toolkit centered around 5 pillars: 1. Governance & Decision-Making 2. Financing & Capital Access 3. Due Diligence & Risk Management 4. Negotiation & Ownership Structures 5. Long-Term Wealth Creation & Indigenous Capital Sovereignty Consultant to meet with COO Technical Staff bi-weekly to virtually review the toolkit as it progresses.	7 weeks after start of the project
Presentation of Toolkit to Chiefs Committee on Economic Development	Consultant to present finalized toolkit to the CCoED and relevant virtual circulation.	8 weeks after start of project

WORKING RELATIONSHIP

- This contract will be supervised by the Chiefs of Ontario Director of Economic Development.
- The Consultant will work directly with the COO Director of Economic Development.

PROFESSIONAL FEES

Applicants are to complete the Fee Schedule as fully as possible by replicating the table below in their proposal. Do not include HST in fees quote but specify where HST is applicable. The fees quoted should be the applicant's best and only price. Estimated cost is the estimated hours multiplied by the hourly rate. All travel expenses must be included in the Proposal Fee Schedule, and the total projected costs should not exceed unless COO requests additional travel.

Work Components	Estimated Hours	Hourly Rates	Est. Cost (Hours times Rates)	Est. Time Completion
Total Cost & Completion Dates				

Additional points for applicants to consider:

- The Consultant must commit to a firm price for the entire contract. No increases during the course of the contract will be allowed. All subcontractors' fees must be included in the quoted fees.
- Expenses should be estimated and explained with the Professional Fee schedule

PROPOSAL EVALUATION

All submissions will be evaluated on the following criteria:

- Quality of the proposal;
- Capacity of the applicant to undertake the project;
- Appropriateness of the project budget and timelines;

COO RESERVES THE RIGHT TO:

- Reject any or all proposals received;
- Enter into negotiations with one or more applicants on any aspect of the proposal;
- Accept any proposal in whole or in part;
- Cancel, modify or reissue this document at any time;
- Verify any and all information provided in the proposal.

PROPOSAL REQUIREMENTS:

All submissions must include the following:

- Cover Letter;
- Detailed work plan with all deliverables accounted for;

- Completed fee schedule of estimated budget in alignment with deliverables;
- CVs and References

RECEIPT OF PROPOSALS

Packages to be clearly marked: “RFP: Equity Participation Toolkit” by December 15th, 2026 at 1:00PM Eastern Standard Time (EST).

Submit electronically to Economic Development Sector at Arvind.sharma@coo.org with cc to Jey.Pakeerathan@coo.org . Submissions received after the stated deadline will not be accepted.