2014-2015 Guide to submitting proposals to the Contributions Program for Non-profit Consumer and Voluntary Organizations

SPECIAL CALL FOR PROPOSALS, July 2014

Office of Consumer Affairs
Industry Canada

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Section 1 - Introduction

1.1 Background

The Contributions Program for Non-profit Consumer and Voluntary Organizations (the Program) was established by the Office of Consumer Affairs (OCA) in order to support such organizations in the production of high quality, independent and timely research on consumer issues.

The overall goal 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.

Before submitting a proposal, it is recommended that you:

1) Review the projects currently funded under the Program:
   http://www.ic.gc.ca/eic/site/oca-bc.nsf/eng/h_ca00175.html

2) Review the past projects funded under the Program. This information is located in the OCA Consumer Policy Research Database at: http://www.ic.gc.ca/eic/site/oca-bc.nsf/eng/h_ca02236.html

3) Review the type of funding available and the priorities in section 2.2.

1.2 How to Use this Guide

This guide explains the Program. Please read all sections of this guide before preparing your proposal.

- Section 2 outlines the Program's eligibility criteria and explains its funding structure;

- Section 3 describes how to prepare a proposal;

- Section 4 provides information on eligible costs;

- Section 5 explains how the OCA evaluates proposals;

- Section 6 details the requirements under the Contribution Agreement;

- Section 7 explains the reporting and invoicing process;

- Annex 1 outlines all questions contained in the Application Form;

- Annex 2 provides frequently asked questions pertaining to use of the Application Form.

1.3 Contacting the Office of Consumer Affairs

Any inquiries regarding the Program and the related applications and proposals should be addressed to:

> Janique Brosseau
> Program Advisor
> Office of Consumer Affairs
> Industry Canada
> 235 Queen Street
> Ottawa, Ontario K1A 0H5
> Tel: 613-952-2771   Fax: 613-952-6927
> Email: ContributionsProgram@ic.gc.ca

Section 2 – Program Overview

Please read this section of the guide carefully. It will help you understand the Program and whether or not you are eligible to apply.

2.1 Eligibility

Who is eligible?

Eligible recipients will be voluntary 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 the structure, governance and funding arrangements which do not expose them to commercial influence on their research and policy positions;
- are capable of reaching consumers who are not members of the organization itself;
- are competent, credible, and accountable in carrying out the projects;
- are guided by objectives which are consistent with the program objective.

Who is not eligible?

Individuals and profit-oriented organizations are not eligible for support under the Program. Industry, trade and professional groupings are excluded from eligibility, as are representatives of business or commercial interests. Government departments, agencies and organizations, academic institutions and their associated research agencies, and political parties and organizations involved in partisan political activity do not qualify for Program support.

2.2 Types of Funding Available

For this special call for proposals, $500,000 is available to fund the specific research projects outlined in Section 2.2.1 below.

2.2.1 Research Project Contributions

Research Project Contributions support sound research and analysis directed at consumer protection issues which are national in scope. They improve the capacity of consumer organizations to carry out such research and analytical activities.

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 <u>not</u> eligible.

For this special call for proposals, specific research priority areas are identified below.

Research Project Priority Areas:

The purpose of this call is to solicit targeted research proposals which could include:

- Identification of current specific internal trade barriers that may have an impact on consumers; and how to better align standards or measures, and formal regulatory cooperation, to address the "web of rules" faced by consumers and businesses. This could include a review of consumer policy in other jurisdictions or identifying international best practices.

- How to enhance consumer choice through the strategic alignment of provincial and territorial (and, where applicable, federal) standards or measures in the following sectors:
    - o Manufacturing – e.g., ensuring consumers in every province and territory have protections from unsanitary practices in the manufacture of upholstered and stuffed articles such as apparel, furniture, toys and bedding;
    - o Automotive – e.g., safety, insurance and licensing;
    - o Electronic commerce – e.g., examining federal, provincial and territorial frameworks regarding online and mobile purchases with a view to ensure consistent rights and obligations for consumers and businesses;
    - o Housing – e.g., setting national standards for home inspections.
- Probing consumer awareness of the Agreement on Internal Trade and its provisions for consumers, and exploring options for a sustained institutional role for consumer organizations.

2.3 Program Budget Allocations

The amount of assistance will be that which, in the opinion of the Minister is required to ensure that the project proceeds successfully. The government assistance may not exceed the eligible costs supported. For more information on eligible costs, please refer to Section 4.

The maximum contribution per project is $100,000.The maximum amount that can be awarded to a single organization per year is the sum total of $500,000 for all projects undertaken.

2.4 Project Duration

Projects may begin no later than October 1, 2014, with preliminary results available mid-December 2014 and must be completed by March 31, 2015, at the latest.

Please note that two-year projects are **not** eligible for this call for proposals.

Section 3 - Preparing a Proposal

Once you have decided that your organization meets the requirements and limitations described in Section 2 of this guide, you can move on to the next step: preparing your proposal.

Proposals must only be submitted to the OCA via its customized Application Form (available via the OCA website). No other formats will be accepted.

A link to the PDF Application Form is available on the OCA website:
http://www.ic.gc.ca/eic/site/oca-bc.nsf/eng/h_ca00175.html

Important information on using the OCA customized Application Form:

- Make sure you have the latest version of a PDF reader: The Application Form is in Portable Document Format (PDF). To view a PDF document, you must have a PDF reader installed. If you do not already have such a reader, there are many available to download for free. (see Annex 4 for the list of free readers)

- Download the right form: Application Forms from previous years will not be compatible with the current year's call for proposals and will be rejected by the system. In order to download the correct PDF file:
    - Go to the OCA 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".

    Note: You can edit and complete the Form off-line using your PDF reader software. However, you need to be connected to the Internet in order to submit the form to OCA.

- Saving your proposal: The Application Form allows you to save your draft proposal at any time so you can edit or continue it later. Once the application is complete, you can then print and submit it to OCA.

- Multiple Proposals: The Application Form has a feature that allows you to clear the "Proposal" section in Step 3 of an already completed application while retaining all of your information from Steps 1 and 2. Start by re-saving your completed

application with a different title. You can then clear the proposal section of the Form by using the "Reset" button and prepare another proposal using the same form.

- <u>Active Internet connection:</u> You need to be connected to the Internet in order to submit your form to OCA.

- <u>Submit early</u>: You must account for a slight transmission delay when submitting your Application Form depending on the size of your attached documents and the type of internet connection you are using. The delay can be anywhere from a few seconds to several minutes. It is strongly recommended that you submit your proposal **at least 10 minutes prior to the closing deadline** in order to reduce the risk of the proposal not being transmitted/submitted in time. The submission system closes automatically and will decline any late proposals.

3.1 Form Submission Requirements

There are three steps required in order to submit a proposal to qualify for consideration under the Program.

For your convenience, all questions contained in the Application Form are annexed to this Guide.

Throughout the application form, you will be asked to provide supporting documentation. If you do not currently have electronic versions of the supporting documentation that is needed (budget forecast, lobbyist declaration, etc.), you may simply scan the hard copies and attach them. We accept the following image formats (BMP, JPEG, PDF and GIF).

Step 1 – Determine eligibility of your organization

This section is mandatory and only has to be completed once. This step helps organizations determine and confirm if they are eligible for funding under the Program. Once this step is completed and validated, then you will be able to complete Step 2 (Organization information).

Step 2 – Organization information

This section is mandatory and only has to be completed once. This section asks for the contact information for the organization, membership and donor information, publications details (e.g. magazine, newsletters or blogs).

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.

It also requires the organization to make the following **declarations**. If you answer "Yes" to one or more of the following declarations, you will be required to attach a document providing as for:

- *Lobbying Act*: do you presently employ in your organization persons to lobby on your behalf? If yes, please provide assurance that, where lobbyists are used, they are registered in accordance with *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*: do you presently employ in your organization or on your Board of Directors 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:* do you presently employ in your organization or on your Board of Directors 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, organizations are required to **attach** the following **6 documents** in order to proceed:

- the incorporation documents (i.e. proof of provincial or federal non-profit incorporation, or both, if applicable);
- the latest audited financial statement[1] (i.e. independent auditor's report) prepared by a Chartered Accountant;
- the current 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 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.

Once this section has been completed you will be able to submit as many proposals from your organization as you see fit.

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

Step 3 – Preparing your project proposal

For this special call for proposals, only research proposals are eligible. See below for more details:
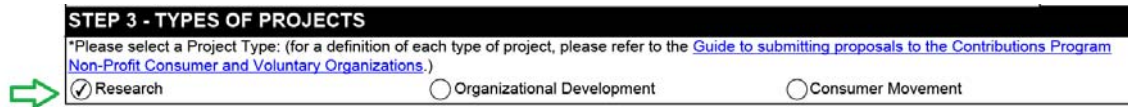
- The identified research priority areas are identified in section 2.2 of this Guide;

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[1] 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: www.cica.ca/CAS)

- <u>Proposals that are not aligned with those areas will not be considered for funding.</u>

Instructions on how to fill in a Research Proposal

Once step 1 and 2 have been completed and validated, then you will be able to submit proposals for your organization. In order to do that, please select "Research" in Step 3.

Identification of the other sources of funding:

All proposals must include other sources of funding requested for this project (or a similar one), a project summary, a communications plan, a detailed work plan, and demonstrate the work plan's feasibility by showing it to be clear and realistic, with measurable objectives and time frames.

Proposal budget:

All proposals must include a detailed budget. All eligible costs are described in Section 4 of this guide. No attachment will be accepted for this step – you must use the budget template imbedded in the PDF Application Form. Please provide details for expenses when possible. For example, if any contracts for services will be required for you projects, please ensure to clearly identify them (contractor's name, if available, and per diem, if relevant).

Maximum funding for a single project is $100,000. Please note the sum of these individual grids will not be automated in the Application Form; therefore please ensure the total amount requested to the Minister does not exceed $100,000 with both grids combined.

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.

Save as you go:

Remember that the Application Form will allow you to draft your proposals, save it and return later to complete or revise it, print it and submit it.

Proposals have a maximum length:

Project proposals have a set overall maximum in length. Each question/section will display their respective maximum number of characters allowed. Please note that spaces and hard returns are counted as characters and add to your total number of characters.

Review your proposal before submitting:

Once your proposal is complete, all fields have validated and the proposal is ready for submission, a thorough review is strongly recommended before officially submitting it to OCA for evaluation. Once you have submitted you proposal ("Submit" button), no further changes are possible.

Keep a record of your proposal:

You should print your proposal before you submit it by using the "Print" button in the Application Form. You can also save a copy of your proposal on your desktop or data storage device (e.g. USB flash drive) by using the "Save As" button and naming it accordingly.

Submitting multiple proposals:

Once a proposal has been saved and submitted, pressing the "Reset" button in the form will erase all the information from the proposal section (Step 3 only) while saving all the information and attachments from Steps 1 and 2.

3.2 Application Deadline

Applicants have until **noon Pacific Time** (i.e. 3 pm Ottawa time), **August 5, 2014** to submit their proposals. Incomplete and off-topic proposals will not be assessed. The submission system closes automatically and will decline any late proposals. Proposals sent by fax, email, or via any other channel will **not** be accepted.

3.3 Confirmation of Receipt

A PDF confirmation is displayed on your screen after your proposal has been successfully submitted right after you have pressed the "Submit" button . Please keep the confirmation document for your records. If you do not see a confirmation page, there might have been a problem submitting your proposal.

Verify that you have attached all the required documentation (and below the maximum file size acceptable – 10 MB) and that all fields are filled in correctly. If you have any concerns, you should contact the OCA for advice as soon as possible before the closing deadline to ensure your proposal is transmitted/submitted properly and in time.

Section 4 - Eligible Costs for Projects

Eligible costs for contributions will be those costs that are incurred by the recipient and which, in the opinion of the Minister of Industry, are reasonable and required to carry out the eligible activities to which they relate. Only costs that are reasonable and which relate directly to the eligible activities will be allowed.

Project eligible costs fall into two categories: 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 Bare** comprised of indirect costs that can be chargeable to research projects. Up to 15 percent of the total eligible costs for the project can be comprised of rent and overhead expenses (i.e. Part B eligible expenses).

Note: the budget grid included in the PDF Application Form contains all the necessary fields and categories outlined below.

4.1 Part A – Direct Project Costs for Research Projects

These include:

- salaries and benefits (salaries and benefits of employees working on the project – please specify the per diem for each person working on the project);
- contract for services (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);
- travel expenses (for persons working on the project only);
- materials (includes office supplies, printing, postage);
- accounting (bookkeeping and audit fees relative to the contribution only);
- other – translation of final report, translation of executive summary, methodology review of project results and final report, communication activities, etc. Please specify (related to project's objective only)

4.2 Part B – Indirect Costs for Research Projects

These include:

- rent and utilities (office rental, hydro, heat, telephone, etc.);
- equipment and use (rental of office equipment specifically requested in the project proposal and approved by the department — may include computer equipment);
- other (related to project's objective only; can include liability insurance).

** Up to **15 percent** of the total eligible costs for the whole project supported can be comprised of rent and other overhead expenses (i.e. eligible costs under Part B). Please also ensure that the requested amounts in Part B do not exceed your organization's total annual expenditures for each category (i.e. rent costs, etc.).*

Section 5 - Assessment

Organizations compete for Program funding, and applicants should bear in mind the competitive nature of the application process. All proposals for funding are reviewed in

accordance with the general program objectives as well as the specific eligibility criteria of the particular type of funding sought.

5.1 Assessment Criteria

OCA assesses **research** proposals for:

- relevance, importance and timeliness of the consumer issue,
- methodology,
- capability of the research team and,
- communications planning.

5.2 How Proposals are Evaluated

Each proposal is scored on a total of 100 points and ranked by overall score, from highest to lowest.

The evaluation process comprises the following steps and factors:

- All proposals are evaluated by policy analysts of OCA, and other relevant departments, and agencies as appropriate.
- Proposals are evaluated according to the overall criteria laid out in section 5.1.
- The evaluations of all proposals as well as specific comments from the evaluators are reviewed by the OCA Program Management Committee composed of the Director General, the Director of Consumer Policy and the Director of Consumer Services and Outreach.
- Before making final recommendations, the OCA Program Management Committee examines:
    - o the consistency and accuracy of scoring in the evaluations by internal and external reviewers;
    - o relevance to proposed policy making:
    - o the capacity of the organization to deliver, make effective use of, and communicate results, and;
    - o capacity building in the consumer movement.
- The OCA Program Management Committee will make the final funding recommendations on which proposals should be funded.
- Organization directors will be notified of the status of their proposals when the evaluation process is complete in September 2014

Section 6 - Background on the Requirements under Contribution Agreements for Funded Projects

This section outlines useful information about obligations stated in all Contribution Agreements drawn for funded projects under the Program. This information can also be useful when developing your project proposals.

Once a proposal is accepted to receive funding, OCA will prepare the Contribution Agreement between the recipient and Industry Canada. This agreement "is a written agreement or documentation constituting an agreement between the Government of Canada and an applicant or a recipient setting out the obligations or understandings of both with respect to one or more transfer payments"[2].

Once signed by the recipient and Industry Canada, the Contribution Agreement terms cannot be changed or modified without the consent of both parties. Any such change must be recorded as an official amendment to the Agreement.

6.1 Language Requirements

Executive summaries of all final research project reports constitute information for the general public and are **required to be in both French and English.** It is strongly suggested to have the final research report translated in both languages and posted on your organization's website. This facilitates and improves the dissemination of research project results to various audiences and stakeholders.

The translation of executive summaries and final reports for development projects is not mandatory. However, depending on the nature of the project and if the organization deems it necessary and appropriate, translations can be undertaken and/or required.

Translation costs are allowable expenditures under the Program, and should be requested in project proposals. For further information please visit: http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12515

6.2 Methodological Review Requirements[3] – Third Party

Organizations conducting research projects are required to submit a brief independent review of the validity of the research project's methodology, conclusions and recommendations by a qualified methodologist.

OCA recommends that the methodologist be retained and consulted on the methodology at the project design stage, consulted as necessary during the project and engaged in the final report preparation. **Organizations must take into account the methodologist's comments <u>before</u> finalizing the project report.**

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[2] Treasury Board of Canada Secretariat (2009). *Policy on Transfer Payments*. Available at: http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=13525&section=text
[3] This is a mandatory requirement for **all** research projects.

The methodologist must be an **independent third party** (e.g. academic resource), unaffiliated with the organization concerned. The organization must provide evidence that the methodologist has appropriate qualifications and experience to **assess the validity of the research methods** employed in relation to the subject matter of the study.

Please note that OCA will not accept a methodologist review unless fully satisfied that the methodologist has the required relevant expertise and qualifications to review the project results and the final report. Organizations are strongly encouraged to submit to OCA for review and approval the name and qualifications of the methodologist before he/she is hired.

6.3 Audit Requirements

Organizations receiving project contributions may be required to submit project(s)'s audited financial statement(s) of all expenses related to funded project(s) – see below for details. The objective of this document is to provide reasonable assurance, by a Chartered Accountant, that eligible cost have been incurred

- $100,000 or more: For organizations receiving $100,000 or more in project contributions in any given year, **audits will be required** for each of the projects funded under the Program in that fiscal year. Audit fees are allowable expenditures under the Program, and should be requested in project proposals.

- $40,000 to $100,000: For organizations receiving less than $100,000 but more than $40,000 in project contributions in any given year, an audit may, at the discretion of OCA's Director General, be required for each of the projects funded under the Program in that fiscal year.

- Less than $40,000: For organizations receiving $40,000 or less in project contributions in any given year, audits will not be required for the projects funded under the Program.

Section 7 - Reporting and Invoicing for Funded Projects

This section contains information about reporting and invoicing for funded projects. This information can also be useful when developing your project proposals.

7.1 Reporting and Invoicing Requirements

By signing a Contribution Agreement, an organization agrees to submit fully completed and signed Progress Reports and/or meet specific pre-determined expectations and Financial Reports, as scheduled and outlined in the Contribution Agreements, for the duration of the project.

OCA staff will compare and analyse Progress Reports against the project's detailed work plan and/or pre-determined performance expectations contained in the signed Contribution Agreement, and must be satisfied that the terms of the Agreement are met, before payments are made.

OCA reserves the right to request that an organization submit interim work for review (e.g. draft report, preliminary bibliography, draft interview guides, etc.). The Progress Reports should be complete and detailed to allow analysts to efficiently monitor the progress and /or changes throughout the duration of your project.

Organizations are required to provide a Communications Report at the end of each project with the final report. The report should present the results of all the communications efforts undertaken or to be undertaken as part of the project and with the final report.

For example:

- details on the distribution of the final report and the impact of final project results, more specifically, the number of final report and/or executive summaries distributed, to whom,

- media coverage (press clippings, radio and telephone interviews, etc.),

- number of presentations to stakeholders, if any,

- impact of internal communications efforts, and

- impact of external communications efforts (partners, other stakeholders).

7.2 Final Reports

All final project reports and bilingual executive summaries (PDF or Word format) are to be **submitted electronically only** to OCA (no paper copies required). Other documentation requiring original signatures are to be mailed to OCA.

Annex 1 – Research Project Questions

All questions are mandatory.

Project Proposal Title

Other Requested Source(s) of Funding:

Please identify all sources of funding related to the proposal (or similar topic) that you are seeking funding for from the OCA Contributions Program. If you have received or are applying for project funding with any other federal, provincial or territorial government department or agency, please provide the name of the source, the current status, date, amount and project title for the funding.

> - Source (Level of government and name of department or agency):
> - Title:
> - Status: Pending, Refused or Approved
> - Date requested:
> - Amount:

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
- Summary of communication strategy to promote the research results/recommendations to the selected target audiences.

(4000 characters) approximately 1 Page(s).

C - The Proposal

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, etc.).

(maximum 2000 characters) approximately 1/2 Page(s). **10 points**

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 2000 characters) approximately 1/2 Page(s). **5 points**

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 4000 characters) approximately 1 Page(s). **5 points**

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 2000 characters) approximately 1/2 Page(s). **5 points**

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 4000 characters) approximately 1 Page(s). **10 points**

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 2000 characters) approximately 1/2 Page(s). **10 points**

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.

> OCA requires that a methodologist be retained and consulted on methodology for each research project.
>
> **Examples of methodological approaches**: literature review; public opinion research/surveys; structured interviews; discussion groups, field research; mystery shopping; discourse analysis; experimentation; other; combination of above.
>
> **An example of a demonstration of appropriateness of methodology**: "A telephone survey of a representative sample of Canadian consumers over 18 will support an analysis of their satisfaction with gym club sales tactics, the incidence of misleading or potentially misleading statements by sellers, and how these experiences vary by jurisdiction. Combined with a review of media stories, applicable laws, and key informant interviews (list informants), conclusions may be drawn as to the effect of these regulations, including a gap assessment. The representativeness of the survey will be confirmed by the third-party methodologist and with advice from the professional survey firm. The methodologist will also review the appropriateness of the conclusions drawn from the research as a whole."

(maximum 6000 characters) approximately 1 1/2 Page(s). **20 points**

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 4000 characters) approximately 1 Page(s). **5 points**

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 4000 characters) approximately 1 Page(s). **10 points**

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;

- 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 4000 characters) approximately 1 Page(s). **10 points**

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.

Direct cost include:

- salaries and benefits (salaries and benefits of employees working on the project);
- contract for services (for research, data collection, surveys, special assistance, contract employees, etc.);
- travel expenses (for persons working on the project or for the Board of Directors when project approval is sought from the Board);
- materials (includes office supplies, printing, postage);
- accounting (bookkeeping and audit fees relative to the contribution only);
- other (related to project's objective only; can include translation, methodology review of project results and final report, etc.).

Indirect cost include:

- rent and utilities (office rental, hydro, heat, telephone, etc.)
- equipment and use (rental of office equipment specifically requested in the project proposal and approved by the department - may include computer equipment); and
- other (related to project's objective only; can include liability insurance).

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

Annex 2 – Application Form Q&As

Where can I download the latest version of the PDF reader?

To access the Portable Document Format (PDF) version of the Application Form you must have the latest PDF reader installed. If you do not already have such a reader, there are numerous PDF readers available for free download or for purchase on the Internet:

- 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/

I forgot to keep a copy of the proposal that I just submitted. How can I request a copy?

Please contact the Program Team at the Office of Consumer Affairs to request a copy of your proposal. You can reach the Program Team via email (ContributionsProgram@ic.gc.ca) or by phone at (613) 952-2771.

What should I put in the Membership Information section?

This section asks eligible organizations to enter their membership details. For example, do you have individual, institutional or academic members? If so, please identify each category of members along with their respective fees (how much it cost them each 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. Why is that?

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

I tried submitting my proposal but the system "times out" and I don't see a confirmation page. What should I do?

If a confirmation page was not displayed, there is a strong possibility that your proposal was not received. Please contact the Program Team at the Office of Consumer Affairs **as soon as possible** to see if your proposal was received. You can reach the Program Team via email at ContributionsProgram@ic.gc.caor by phone at (613) 952-2771.

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

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

I submitted a proposal but have not received the confirmation yet. How can I ensure my proposal was sent to OCA?

The confirmation is displayed on your screen right after you have pressed the "Submit" button. If you did not see / receive a confirmation message that your proposal was submitted, please resubmit it using the "Submit" button on the last page. If this problem persists, please promptly contact the Office of Consumer Affairs via email at ContributionsProgram@ic.gc.ca or by phone at (613) 952-2771.

When I paste content into a text box in the Application Form, the text cuts off. Why?

If you are inputting text from a word processing file (e.g. Microsoft Word, Notepad, etc.) into the PDF form, please remember that all fields have a maximum length which is displayed in each question. The Application Form character count feature takes into account all spaces and hidden characters, including hard returns. If there is a difference between the Application Form and the one included in your 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.

Tips for Apple users and downloading the Application Form with various browsers (Safari, Chrome, Firefox and Opera)

- When I try to open the Application Form (PDF) 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?

  If you move your mouse to the bottom-middle on the page, a new menu with four icons (see example below) will appear that give you 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?

  If you move the mouse to the bottom-right on the page, a new menu with six icons (see example below) will appear that give you the option to save it and download it to your computer.

- If you are trying to open the Application Form using **Firefox** and/or **Opera** as the browser, a pop-up window will be displayed asking you to Open or to Save (download) the form to your computer. Please choose the option that is most convenient for you.