

Financial Literacy Mobile Application Platform Services (20170313)

Details	
Reference Number:	<i>Provided by the buyandsell.gc.ca system</i>
Solicitation Number:	20170313
Region of Opportunity	National Capital Region
Region of Delivery:	National Capital Region
Notice Type:	Notice of Proposed Procurement (NPP)
GSIN	B506B
Trade Agreement:	<p>Agreement on Internal Trade (AIT)</p> <p>North American Free Trade Agreement (NAFTA)</p> <p>World Trade Organization-Agreement on Government Procurement (WTO-AGP)</p> <p>Canada-Chile Free Trade Agreement</p> <p>Canada-Peru Free Trade Agreement</p> <p>Canada-Colombia Free Trade Agreement</p> <p>Canada-Panama Free Trade Agreement</p> <p>Canada-Honduras Free Trade Agreement</p> <p>Canada-Korea Free Trade Agreement</p>
Tendering procedure:	Open
Procurement Entity:	Financial Consumer Agency of Canada
End User Entity:	Financial Consumer Agency of Canada
Contact Information	
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Description	
<p>REQUIREMENT:</p> <p>The Financial Consumer Agency of Canada requires the services of a mobile application platform services provider to administer a project designed to encourage and measure financial knowledge, attitudes, confidence and behavioural change using targeted financial literacy interventions/consumer education messaging.</p> <p>FCAC's objective is to obtain the services of a Vendor to provide a current and established mobile application platform capable of supporting FCAC in meeting its requirements, including:</p>	

1. To strengthen the financial literacy of target groups;
2. To influence Canadians to be more financially literate and foster behavioural change;
3. To improve FCAC's understanding of Canadians' financial literacy, and to inform and better target policy and program measures; and
4. To direct Canadians to the FCAC website where they can access multiple resources (e.g., tools, calculators, and consumer education materials) aimed at enhancing financial literacy.

In addition, FCAC requires the services of the Contractor in the development of intervention and/or campaign content, as required and as authorized by FCAC.

1.1. Background and Specific Scope of the Requirement

The FCAC was created by the Government of Canada in October 2001 to foster consumer knowledge of financial matters and to strengthen oversight of consumer issues in the financial sector. As part of its mandate, FCAC is responsible for providing timely and objective information and tools to help consumers understand a range of financial issues, products and services so they can make informed and responsible financial decisions.

In April 2014, the Government of Canada appointed Canada's first Financial Literacy Leader ("Leader"). The Leader, who operates within FCAC, is tasked with coordinating and collaborating activities with stakeholders to strengthen the financial literacy of Canadians. The role of the Leader is to develop and implement Canada's national strategy for financial literacy.

To help implement the strategy, FCAC is currently exploring innovative ways of reaching and engaging Canadians to assist them in better managing their money and debt wisely, planning and saving for the future, and preventing and protecting them against fraud and financial abuse. More specifically, efforts focus on four key areas: budgeting, paying down household debt, building savings, and the complexity of the financial services industry.

FCAC conducted a pilot project in 2016 using a mobile application platform designed to encourage and increase financial literacy and to enable through financial literacy and consumer education interventions. Users were rewarded for participating through loyalty reward program offers. This pilot project was undertaken from July to August 2016, and included four (4) interventions to approximately 30,000 participants in two (2) provinces. FCAC is now looking to expand on this pilot.

The Contractor shall develop and implement a strategy to disseminate interventions in both in English and French for FCAC through the Contractor's existing mobile application platform, using incentives (i.e. loyalty program reward points) to nudge Canadians towards better financial literacy and financial behaviours. The Contractor shall develop and provide a detailed work plan for the project, and shall liaise with FCAC's project manager(s), IT personnel, and other FCAC staff as necessary.

As required, the Contractor shall develop or assist FCAC in developing interventions and/or intervention content, and advise on or support content related to an intervention or a campaign related to financial literacy.

The Contractor shall provide FCAC with anonymized individual and aggregate data (as described in 2.1.3 of the SOW in the attached RFP), as well as written interim and final reports demonstrating the types of intervention designs and types of incentives that work best to change the behaviours of Canadians when it comes to the management of their personal finances, and other details as agreed upon with FCAC.

Note: this project will not involve public opinion research and all interventions via the app will be factual and behavioural in nature

ESTIMATED CONTRACT PERIOD

The estimated period of the contract will be for approximately three (3) years, commencing upon contract award. FCAC reserves the right to extend the term of the Contract by up to two (2) additional one (1) year periods, at FCAC's sole discretion.

MANDATORY TECHNICAL CRITERIA

M1 The Bidder **MUST** have an existing and established mobile application platform capable of meeting the requirements in the Statement of Work. Note that the application is not required to be related to financial literacy, but is required to be able to deliver the interventions, use incentives, and gather data as described.

The app MUST have an existing and established user-base of at least 25,000 Canadian users. To demonstrate this, the Bidder should include a User Report as of December 31, 2016, or later. The user report should include a profile of application users using ALL demographic variables captured within the existing app.

The app MUST have existing English and French versions.

M2 The Bidder MUST have existing relationships with loyalty point providers for use within its application to incentive users.

The following can be provided for compliance to the criteria:

- application related screenshots or;
- any documents supporting the agreement with the provider.

M3 The Bidder MUST include a draft project/implementation plan.

The draft project/implementation plan should include, but not necessarily be limited to, the following:

- Start-up activities to prepare for FCAC's first intervention;
- Implementing FCAC's provided interventions/questions into its application;
- Approach to attracting new users and method for ensuring representative sample size;
- Data gathering stage;
- Data analysis and report delivery to FCAC;
- As-required adjustment cycle; and
- Any other items the Bidder feels would add benefit to FCAC's requirement.

M4 The Bidder MUST include its privacy policy and data management plan, which MUST ensure the privacy and security of information gathered throughout the use of the Bidder's proposed Application.

M5 The Bidder MUST provide at least one (1) project summary where they have used its proposed established/existing mobile application to conduct behavioural research / information gathering of the type described in the Statement of Work within the last two (2) years.

The following should be provided for each project:

1. the name of the client organization;
2. client point of contact
3. a brief description of the scope of services provided;
4. Obtained response rate
5. start and end date of the project;

FCAC reserves the right to contact the client for validation purposes only.

POINT-RATED TECHNICAL CRITERIA

R1 Platform engaged user-base: Up to 36 points

The Bidder should demonstrate the size of the applications' engaged user-base through the provision of a user report as of December 31, 2016, or later.

R2 Platform Availability: Up to 25 points

The Bidder should demonstrate the availability of its proposed application, by province and by user-base characteristics, such as age distribution and reported gender.

R3 Platform Engagement methods: Up to 20 points

The Bidder should recommend methods of engagement for use for FCAC's current requirement, and describe why the recommended methods will be effective for FCAC.

The Bidder should include examples of how each method has been successfully applied in past projects, and include metrics and other appropriate evidence to demonstrate its success.

R4 Privacy and Data Management Plan: Up to 14 points

The Bidder's proposed privacy policy and data management plan should be rigorous and complete, and should ensure the integrity and privacy of the data.

The Data Management Plan should include, but not necessarily be limited to, how data is stored (e.g. cloud servers, data centre, etc.), and where data is stored (e.g. city, province or state, and country).

R5 Project Summary: Up to 15 points

The Bidder's provided project summary is similar and relevant to FCAC's requirements.

R6 Draft Implementation Plan: Up to 15 points

The Bidder's proposed Draft Implementation Plan will be evaluated on its completeness and practicality to FCAC's requirement.

R7 Sample Report

The Bidder should provide a sample report, based on the scenario included in the RFP.

PROOF OF PROPOSAL (OPTIONAL)

FCAC reserves the right to invite the **highest-ranked** Bidder after Technical and Financial Evaluation to a **Proof of Proposal (PoP) demonstration**.

ENQUIRIES:

To ensure a response before the bid closing date, all enquiries about this requirement must be submitted in writing and received by the Contracting Authority at least seven (7) calendar days prior to the bid closing date.

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