

**RETURN BIDS TO:**  
**RETOURNER LES SOUMISSIONS À:**  
**Bid Receiving - PWGSC / Réception des  
soumissions - TPSGC**  
**11 Laurier St. / 11, rue Laurier**  
**Place du Portage, Phase III**  
**Core 0A1 / Noyau 0A1**  
**Gatineau**  
**Québec**  
**K1A 0S5**  
**Bid Fax: (819) 997-9776**

**REQUEST FOR PROPOSAL  
DEMANDE DE PROPOSITION**

**Proposal To: Public Works and Government  
Services Canada**

We hereby offer to sell to Her Majesty the Queen in right of Canada, in accordance with the terms and conditions set out herein, referred to herein or attached hereto, the goods, services, and construction listed herein and on any attached sheets at the price(s) set out therefor.

**Proposition aux: Travaux Publics et Services  
Gouvernementaux Canada**

Nous offrons par la présente de vendre à Sa Majesté la Reine du chef du Canada, aux conditions énoncées ou incluses par référence dans la présente et aux annexes ci-jointes, les biens, services et construction énumérés ici sur toute feuille ci-annexée, au(x) prix indiqué(s).

**Comments - Commentaires**

<b>Title - Sujet</b> Economic Action Plan	
<b>Solicitation No. - N° de l'invitation</b> 60074-120925/A	<b>Date</b> 2013-05-02
<b>Client Reference No. - N° de référence du client</b> 60074-12-0925	
<b>GETS Reference No. - N° de référence de SEAG</b> PW-\$\$CZ-036-62666	
<b>File No. - N° de dossier</b> cz036.60074-120925	<b>CCC No./N° CCC - FMS No./N° VME</b>
<b>Solicitation Closes - L'invitation prend fin</b> <b>at - à 02:00 PM</b> <b>on - le 2013-05-16</b>	
<b>Time Zone</b> <b>Fuseau horaire</b> Eastern Daylight Saving Time EDT	
<b>F.O.B. - F.A.B.</b> <b>Plant-Usine:</b> <input type="checkbox"/> <b>Destination:</b> <input type="checkbox"/> <b>Other-Autre:</b> <input type="checkbox"/>	
<b>Address Enquiries to: - Adresser toutes questions à:</b> Wright, Brandon	<b>Buyer Id - Id de l'acheteur</b> cz036
<b>Telephone No. - N° de téléphone</b> (613) 991-1475 ( )	<b>FAX No. - N° de FAX</b> (613) 949-1281
<b>Destination - of Goods, Services, and Construction:</b> <b>Destination - des biens, services et construction:</b> DEPARTMENT OF FINANCE LESPLANADE LAURIER W.TWER P-101B 300 LAURIER AVE W. OTTAWA Ontario K1A0G5 Canada	

**Instructions: See Herein**

**Instructions: Voir aux présentes**

**Vendor/Firm Name and Address**  
**Raison sociale et adresse du  
fournisseur/de l'entrepreneur**

**Issuing Office - Bureau de distribution**

Communication Procurement Directorate/Direction de  
l'approvisionnement en communication  
360 Albert St. / 360, rue Albert  
12th Floor / 12ième étage  
Ottawa  
Ontario  
K1A 0S5

<b>Delivery Required - Livraison exigée</b> See Herein	<b>Delivery Offered - Livraison proposée</b>
<b>Vendor/Firm Name and Address</b> <b>Raison sociale et adresse du fournisseur/de l'entrepreneur</b>	
<b>Telephone No. - N° de téléphone</b> <b>Facsimile No. - N° de télécopieur</b>	
<b>Name and title of person authorized to sign on behalf of Vendor/Firm</b> <b>(type or print)</b> <b>Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)</b>	
<b>Signature</b>	<b>Date</b>

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## PART 1 - GENERAL INFORMATION

### 1. Introduction

The bid solicitation is divided into seven parts plus annexes, as follows:

- Part 1 General Information: provides a general description of the requirement;
- Part 2 Bidder Instructions: provides the instructions, clauses and conditions applicable to the bid solicitation;
- Part 3 Bid Preparation Instructions: provides bidders with instructions on how to prepare their bid;
- Part 4 Evaluation Procedures and Basis of Selection: indicates how the evaluation will be conducted, the evaluation criteria that must be addressed in the bid, and the basis of selection;
- Part 5 Certifications: includes the certifications to be provided;
- Part 6 Financial: includes specific requirements that must be addressed by bidders; and
- Part 7 Resulting Contract Clauses: includes the clauses and conditions that will apply to any resulting contract.

The Annexes include the Statement of Work, the Basis of Payment, the Technical and Financial Evaluation, and the Task Authorization Form 572.

### 2. Summary

The Contractor must perform the Work in accordance with the Statement of Work, Annex "A" to provide advertising services for Department of Finance Canada's (FC) Economic Action Plan campaign.

The period of the Contract will be from date of award to **March 31, 2014**, with two (2) additional one (1) year option periods.

The requirement is limited to Canadian goods and/or services.

### 3. Debriefings

After contract award, bidders may request a debriefing on the results of the bid solicitation process. Bidders should make the request to the Contracting Authority within 15 working days of receipt of the results of the bid solicitation process. The debriefing may be in writing, by telephone or in person.

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## PART 2 - BIDDER INSTRUCTIONS

### 1. Standard Instructions, Clauses and Conditions

All instructions, clauses and conditions identified in the bid solicitation by number, date and title are set out in the *Standard Acquisition Clauses and Conditions Manual* (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

Bidders who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the clauses and conditions of the resulting contract.

The 2003 (2013-04-25) Standard Instructions - Goods or Services - Competitive Requirements, are incorporated by reference into and form part of the bid solicitation.

Subsection 5.4 of 2003, Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete: sixty (60) days

Insert: one-hundred twenty (120) days

Subsection 8 of 2003, Standard Instructions - Goods or Services - Competitive Requirements, is amended as follows:

Delete in its entirety

Insert: OFFERS SUBMITTED BY FACSIMILE OR OTHER ELECTRONIC MEANS WILL NOT BE ACCEPTED.

### 2. Submission of Bids

Bids must be submitted only to Public Works and Government Services Canada (PWGSC) Bid Receiving Unit by the date, time and place indicated on page 1 of the bid solicitation.

Due to the nature of the bid solicitation, bids transmitted by facsimile to PWGSC will not be accepted.

### 3. Enquiries - Bid Solicitation

All enquiries must be submitted in writing to the Contracting Authority no later than five (5) calendar days before the bid closing date. Enquiries received after that time may not be answered.

Bidders should reference as accurately as possible the numbered item of the bid solicitation to which the enquiry relates. Care should be taken by bidders to explain each question in sufficient detail in order to enable Canada to provide an accurate answer. Technical enquiries that are of a proprietary nature must be clearly marked "proprietary" at each relevant item. Items identified as "proprietary" will be treated as such except where Canada determines that the enquiry is not of a proprietary nature. Canada may edit the questions or may request that the Bidder do so, so that the proprietary nature of the question is eliminated, and the enquiry can be answered with copies to all bidders. Enquiries not submitted in a form that can be distributed to all bidders may not be answered by Canada.

### 4. Applicable Laws

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Any resulting contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

Bidders may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their bid, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the bidders.

## **5. Basis for Canada's Ownership of Intellectual Property**

The Department of Finance Canada has determined that any intellectual property rights arising from the performance of the Work under the resulting contract will belong to Canada, on the following grounds: where the material developed or produced consists of material subject to copyright, with the exception of computer software and all documentation pertaining to that software.

## **PART 3 - BID PREPARATION INSTRUCTIONS**

### **1. Bid Preparation Instructions**

Canada requests that bidders provide their bid in separately bound sections as follows:

- Section I: Technical Bid (five (5) hard copies)  
Creative samples (two (2) electronic copies)  
Section II: Financial Bid (one (1) hard copy)  
Section III: Certifications (one (1) hard copy)

If there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.

Canada requests that bidders follow the format instructions described below in the preparation of their bid:

- (a) use 8.5 x 11 inch (216 mm x 279 mm) paper;
- (b) use a numbering system that corresponds to the bid solicitation.

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process Policy on Green Procurement (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, bidders should:

- 1) use 8.5 x 11 inch (216 mm x 279 mm) paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and
- 2) use an environmentally-preferable format including black and white printing instead of colour printing, printing double sided/duplex, using staples or clips instead of cerlox, duotangs or binders.

#### **Section I: Technical Bid**

In their technical bid, bidders should demonstrate their understanding of the requirements contained in the bid solicitation and explain how they will meet these requirements. Bidders should demonstrate their capability and describe their approach in a thorough, concise and clear manner for carrying out the work.

The technical bid should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, Canada requests that bidders address and present topics in the order of the evaluation criteria under the same headings. To avoid duplication, bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

#### **Section II: Financial Bid**

Bidders must submit their financial bid in accordance with the Basis of Payment in Annex "B". The total amount of Goods and Services Tax or Harmonized Sales Tax must be shown separately, if applicable.

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### **Section III: Certifications**

Bidders must submit the certifications required under Part 5.

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## PART 4 - EVALUATION PROCEDURES AND BASIS OF SELECTION

### 1. Evaluation Procedures

- (a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the technical and financial evaluation criteria.
- (b) An evaluation team composed of representatives of Canada will evaluate the bids.

#### 1.1 Technical Evaluation

Mandatory and Point Rated Technical Criteria are included in Annex "C".

#### 1.2 Financial Evaluation

Financial Evaluation Criteria are included in Annex "C".

### 2. Basis of Selection

1. To be declared responsive, a bid must:

- (a) comply with all the requirements of the bid solicitation;
- (b) meet all mandatory criteria; and
- (c) obtain the required minimum points specified for each criterion for the technical evaluation.

The rating is performed on a scale of 1000 points.

2. Bids not meeting (a) or (b) or (c) will be declared non-responsive.

3. The selection will be based on the highest responsive combined rating of technical merit and price. The ratio will be 70 % for the technical merit and 30 % for the price.

4. To establish the technical merit score, the overall technical score for each responsive bid will be determined as follows: total number of points obtained / maximum number of points available multiplied by the ratio of 70 %.

5. To establish the pricing score, each responsive bid will be prorated against the lowest evaluated price and the ratio of 30 %.

6. For each responsive bid, the technical merit score and the pricing score will be added to determine its combined rating.

7. Neither the responsive bid obtaining the highest technical score nor the one with the lowest evaluated price will necessarily be accepted. The responsive bid with the highest combined rating of technical merit and price will be recommended for award of a contract.

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## PART 5 - CERTIFICATIONS

Bidders must provide the required certifications and related documentation to be awarded a contract. Canada will declare a bid non-responsive if the required certifications and related documentation are not completed and submitted as requested.

Compliance with the certifications bidders provide to Canada is subject to verification by Canada during the bid evaluation period (before award of a contract) and after award of a contract. The Contracting Authority will have the right to ask for additional information to verify bidders' compliance with the certifications before award of a contract. The bid will be declared non-responsive if any certification made by the Bidder is untrue, whether made knowingly or unknowingly. Failure to comply with the certifications, to provide the related documentation or to comply with the request of the Contracting Authority for additional information will also render the bid non-responsive.

### 1. Mandatory Certifications Required Precedent to Contract Award

#### 1.1 Code of Conduct and Certifications - Related documentation

By submitting a bid, the Bidder certifies as per section 01 of Standard Instructions 2003 for himself and his affiliates, to be in compliance with the Code of Conduct and Certifications clause of the Standard instructions. The related documentation therein required will help Canada in confirming that the certifications are true.

### 2. Additional Certifications Precedent to Contract Award

The certifications listed below should be completed and submitted with the bid but may be submitted afterwards. If any of these required certifications is not completed and submitted as requested, the Contracting Authority will so inform the Bidder and provide the Bidder with a time frame within which to meet the requirement. Failure to comply with the request of the Contracting Authority and meet the requirement within that time period will render the bid non-responsive.

#### 2.1 Federal Contractors Program - Certification

1. The Federal Contractors Program (FCP) requires that some suppliers, including a supplier who is a member of a joint venture, bidding for federal government contracts, valued at \$200,000 or more (including all applicable taxes), make a formal commitment to implement employment equity. This is a condition precedent to contract award. If the Bidder, or, if the Bidder is a joint venture and if any member of the joint venture, is subject to the FCP, evidence of its commitment must be provided before the award of the Contract.

Suppliers who have been declared ineligible contractors by Human Resources and Skills Development Canada (HRSDC) are no longer eligible to receive government contracts over the threshold for solicitation of bids as set out in the Government Contracts Regulations. Suppliers may be declared ineligible contractors either as a result of a finding of non-compliance by HRSDC, or following their voluntary withdrawal from the FCP for a reason other than the reduction of their workforce to less than 100 employees. Any bids from ineligible contractors, including a bid from a joint venture that has a member who is an ineligible contractor, will be declared non-responsive.

2. If the Bidder does not fall within the exceptions enumerated in 3.(a) or (b) below, or does not have a valid certificate number confirming its adherence to the FCP, the Bidder must fax (819-953-8768) a copy of the signed form LAB 1168, Certificate of Commitment to Implement Employment Equity, to

the Labour Branch of HRSDC.

3. The Bidder, or, if the Bidder is a joint venture the member of the joint venture, certifies its status with the FCP, as follows:

The Bidder or the member of the joint venture

( ) is not subject to the FCP, having a workforce of less than 100 full-time or part-time permanent employees, and/or temporary employees having worked 12 weeks or more in Canada;

( ) is not subject to the FCP, being a regulated employer under the Employment Equity Act, S.C. 1995, c. 44;

( ) is subject to the requirements of the FCP, having a workforce of 100 or more full-time or part-time permanent employees, and/or temporary employees having worked 12 weeks or more in Canada, but has not previously obtained a certificate number from HRSDC (having not bid on requirements of \$200,000 or more), in which case a duly signed certificate of commitment is attached;

( ) is subject to the FCP, and has a valid certificate number as follows: \_\_\_\_\_ (e.g. has not been declared an ineligible contractor by HRSDC).

Further information on the FCP is available on the HRSDC Web site.

## 2.2 Former Public Servant Competitive Requirements

Contracts with former public servants (FPS) in receipt of a pension or of a lump sum payment must bear the closest public scrutiny, and reflect fairness in the spending of public funds. In order to comply with Treasury Board policies and directives on contracts with FPS, offerors must provide the information required below.

### Definitions

For the purposes of this clause,

"former public servant" is any former member of a department as defined in the Financial Administration Act R.S., 1985, c. F-11, a former member of the Canadian Armed Forces or a former member of the Royal Canadian Mounted Police. A former public servant may be:

- a. an individual;
- b. an individual who has incorporated;
- c. a partnership made of former public servants; or
- d. a sole proprietorship or entity where the affected individual has a controlling or major interest in the entity.

"lump sum payment period" means the period measured in weeks of salary, for which payment has been made to facilitate the transition to retirement or to other employment as a result of the implementation of various programs to reduce the size of the Public Service. The lump sum payment period does not include the period of severance pay, which is measured in a like manner.

"pension" means a pension or annual allowance paid under the Public Service Superannuation Act (PSSA), R.S., 1985, c. P-36, and any increases paid pursuant to the Supplementary Retirement Benefits Act, R.S., 1985, c. S-24 as it affects the PSSA. It does not include pensions payable pursuant to the Canadian Forces Superannuation Act, R.S., 1985, c. C-17, the Defence Services Pension Continuation

Act, 1970, c. D-3, the Royal Canadian Mounted Police Pension Continuation Act , 1970, c. R-10, and the Royal Canadian Mounted Police Superannuation Act, R.S., 1985, c. R-11, the Members of Parliament Retiring Allowances Act , R.S. 1985, c. M-5, and that portion of pension payable to the Canada Pension Plan Act, R.S., 1985, c. C-8.

### Former Public Servant in Receipt of a Pension

As per the above definitions, is the Bidder a FPS in receipt of a pension? YES ( ) NO ( )

If so, the Bidder must provide the following information, for all FPS in receipt of a pension, as applicable:

- i. name of former public servant;
- ii. date of termination of employment or retirement from the Public Service.

By providing this information, Bidders agree that the successful Bidders' status, with respect to being a former public servant in receipt of a pension, will be reported on departmental websites as part of the published proactive disclosure reports in accordance with Contracting Policy Notice: 2012-2 and the Guidelines on the Proactive Disclosure of Contracts.

### Work Force Reduction Program

Is the Bidder a FPS who received a lump sum payment pursuant to the terms of a work force reduction program? YES ( ) NO ( )

If so, the Bidder must provide the following information:

- i. name of former public servant;
- ii. conditions of the lump sum payment incentive;
- iii. date of termination of employment;
- iv. amount of lump sum payment;
- v. rate of pay on which lump sum payment is based;
- vi. period of lump sum payment including start date, end date and number of weeks;
- vii. number and amount (professional fees) of other contracts subject to the restrictions of a work force reduction program.

For all contracts awarded during the lump sum payment period, the total amount of fees that may be paid to a FPS who received a lump sum payment is \$5,000, including the Goods and Services Tax or Harmonized Sales Tax.

## 2.3 Canadian Content Certification

### 2.3.1 SACC Manual clause A3050T (2010/01/11) Canadian Content Definition

This procurement is limited to Canadian services.

The Offeror certifies that:

( ) the service offered is a Canadian service as defined in paragraph 2 of clause A3050T.

## 2.4 Status and Availability of Resources

The Bidder certifies that, should it be awarded a contract as a result of the bid solicitation, every individual proposed in its bid will be available to perform the Work as required by Canada's representatives and at

the time specified in the bid solicitation or agreed to with Canada's representatives. If for reasons beyond its control, the Bidder is unable to provide the services of an individual named in its bid, the Bidder may propose a substitute with similar qualifications and experience. The Bidder must advise the Contracting Authority of the reason for the substitution and provide the name, qualifications and experience of the proposed replacement. For the purposes of this clause, only the following reasons will be considered as beyond the control of the Bidder: death, sickness, maternity and parental leave, retirement, resignation, dismissal for cause or termination of an agreement for default.

If the Bidder has proposed any individual who is not an employee of the Bidder, the Bidder certifies that it has the permission from that individual to propose his/her services in relation to the Work to be performed and to submit his/her résumé to Canada. The Bidder must, upon request from the Contracting Authority, provide a written confirmation, signed by the individual, of the permission given to the Bidder and of his/her availability.

## 2.5 Education and Experience

### 2.5.1 SACC Manual clause A3010T (2010-08-16) Education and Experience

## 2.6 Capability of Resources

The Bidder certifies that it has in-house resources capable of meeting roles and responsibilities (as outlined in Annex "A" Statement of Work) of the following categories of service, which are not being evaluated:

- (a) Account Coordination
- (b) Partnerships
- (c) Strategic Planning and Development
- (d) Graphic Design
- (e) Copywriting (English or French)
- (f) Copy Editing (English or French)
- (g) Proofreading
- (h) Translation and Adaptation
- (i) Production Management
- (j) Production Services
- (k) Media Planning and Coordination
- (l) Media Distribution (Trafficking)
- (m) Media Research

( ) YES ( ) NO

## 2.7 Note to Offeror - Exclusivity Provision

1. The Bidder acknowledges and agrees that under the Agency of Record Contract of the Government of Canada for the provision of media placements and related services, contract (EP361-091572/001/CZ), the Bidder, its parent corporation, its subsidiary corporation and any body corporate of the Bidder's immediate family shall not be eligible to bid for any federal government procurement contracts relating to advertising during the term of contract (EP361-091572/001/CZ) or of any extension thereof.

The Bidder acknowledges and agrees that under the contract (EP361-091572/001/CZ), the Bidder's senior officials will disclose all real and potential conflicts of interest by written notice to the Contracting Authority under that contract.

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The Bidder acknowledges and agrees that any subcontractor to the Offeror under contract (EP361-091572/001/CZ) is subject to the same conditions and restrictions as the Supplier under the contract (EP361-091572/001/CZ).

Therefore, the Bidder certifies that it is not the supplier under contract (EP361-091572/001/CZ), a parent corporation, a subsidiary corporation or any body corporate of the Bidder's immediate family or a subcontractor subject to the same conditions and restrictions of the said supplier under contract (EP361-091572/001/CZ). Any certification made by the Bidder that is untrue, whether made knowingly or unknowingly, or failure to comply with the conditions and restrictions mentioned above before or after contract award, or failure to comply with the request of the Contracting Authority for additional information will render the bid non-responsive and any resulting contract will be terminated for default.

2. The following definitions apply to the above provisions:

"PARENT" means, in relation to the supplier under the Agency of Record contract (EP361-091572/001/CZ), a body corporate of which the said supplier under the Agency of Record contract (EP361-091572/001/CZ) is a subsidiary within the meaning of subsection 2(5) of Canada's Business Corporations Act, RSC c C-44.

"SUBSIDIARY" means, in relation to the supplier under the Agency of Record contract (EP361-091572/001/CZ), a body corporate within the meaning of subsections 2(3) and 2(5) of Canada's Business Corporations Act, RSC c C-44, and for the purposes of the Agency of Record contract (EP361-091572/001/CZ), also includes those with a less than 50% ownership.

"FEDERAL GOVERNMENT PROCUREMENT CONTRACTS" means a contract as defined under the Government Contracts Regulations entered into by institutions identified in Schedule I, I.1 and II of the Financial Administration Act, unless excluded by specific acts, regulations or Orders in Council.

"BODY CORPORATE OF THE OFFEROR'S IMMEDIATE FAMILY" means a body corporate (including subsidiaries) that has the same parent as the supplier under the Agency of Record contract (EP361-091572/001/CZ) or means a body corporate that does not operate but acquires and holds shares or a controlling interest in the bidder under the Agency of Record contract (EP361-091572/001/CZ).

"RELATING TO ADVERTISING" means all activities involved in the purchase, by or on behalf of Canada, for the development and production of advertising campaigns and associated purchases of space or time in print or broadcast media, or in other mass media, such as digital, cinema or out-of-home advertising.

"CONFLICT OF INTEREST" means any direct or indirect personal or financial interest, relationship, activity, situation or circumstance as a result of which the supplier under the Agency of Record contract (EP361-091572/001/CZ) is unable or may appear unable to provide impartial and objective assistance, advice or services to Canada.

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## **PART 6 - FINANCIAL REQUIREMENTS**

### **1. Financial Capability**

*Manual SACC clause A9033T (2012-07-16) Financial Capability*

## **PART 7 - RESULTING CONTRACT CLAUSES**

The following clauses and conditions apply to and form part of any contract resulting from the bid solicitation.

### **1. Statement of Work**

The Contractor must perform the Work in accordance with the Statement of Work at Annex "A".

#### **1.2 Task Authorization**

The Work or a portion of the Work to be performed under the Contract will be on an "as and when requested basis" using a Task Authorization (TA). The Work described in the TA must be in accordance with the scope of the Contract.

##### **1.2.1 Task Authorization Process**

1. The Project Authority will provide the Contractor with a description of the task using the "Task Authorization" form specified in Annex "D".
2. The Task Authorization (TA) will contain the details of the activities to be performed, a description of the deliverables, and a schedule indicating completion dates for the major activities or submission dates for the deliverables. The TA will also include the applicable basis(bases) and methods of payment as specified in the Contract.
3. The Contractor must provide the Project Authority the proposed total estimated cost for performing the task and a breakdown of that cost, established in accordance with the Basis of Payment specified in the Contract.
4. The Contractor must not commence work until a TA authorized by the Project Authority has been received by the Contractor. The Contractor acknowledges that any work performed before a TA has been received will be done at the Contractor's own risk.

##### **1.2.2 Replacement or Addition of Key Personnel**

To replace or add key personnel to the contract, the Contractor must submit the name of the proposed individual, the category of service and their curriculum vitae to the contracting authority for evaluation. The individual will be evaluated in accordance with the applicable rated requirements C.2.2 Key Personnel - Requirements and Rated Criteria. The individual must meet the mandatory criteria and obtain the minimum pass mark of 60% in the rated criteria to be considered responsive.

##### **1.2.3 Task Authorization Limit**

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The Project Authority may authorize individual task authorizations up to a limit of \$100,000, Goods and Services Tax or Harmonized Sales Tax included, inclusive of any revisions.

Any task authorization to be issued in excess of that limit must be authorized by the Project Authority and Contracting Authority before issuance.

### **1.2.4 Minimum Work Guarantee - All the Work - Task Authorizations**

1. In this clause,

"Maximum Contract Value" means the amount specified in the "Limitation of Expenditure" clause set out in the Contract; and

"Minimum Contract Value" means \$15,000.

2. Canada's obligation under the Contract is to request Work in the amount of the Minimum Contract Value or, at Canada's option, to pay the Contractor at the end of the Contract in accordance with paragraph 3. In consideration of such obligation, the Contractor agrees to stand in readiness throughout the Contract period to perform the Work described in the Contract. Canada's maximum liability for work performed under the Contract must not exceed the Maximum Contract Value, unless an increase is authorized in writing by the Contracting Authority.

3. In the event that Canada does not request work in the amount of the Minimum Contract Value during the period of the Contract, Canada must pay the Contractor the difference between the Minimum Contract Value and the total cost of the Work requested.

4. Canada will have no obligation to the Contractor under this clause if Canada terminates the Contract in whole or in part for default.

## **2. Standard Clauses and Conditions**

All clauses and conditions identified in the Contract by number, date and title are set out in the *Standard Acquisition Clauses and Conditions Manual*

(<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) issued by Public Works and Government Services Canada.

### **2.1 General Conditions**

2035 (2013-04-25), General Conditions - Higher Complexity - Services, apply to and form part of the Contract.

## **3. Term of Contract**

### **3.1 Period of the Contract**

The period of the Contract is from date of Contract to March 31, 2014 inclusive.

### **3.2 Option to Extend the Contract**

The Contractor grants to Canada the irrevocable option to extend the term of the Contract by up to two (2) additional one (1) year periods under the same conditions. The Contractor agrees that, during the

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extended period of the Contract, it will be paid in accordance with the applicable provisions as set out in the Basis of Payment.

Canada may exercise this option at any time by sending a written notice to the Contractor at least 30 calendar days before the expiry date of the Contract. The option may only be exercised by the Contracting Authority, and will be evidenced for administrative purposes only, through a contract amendment.

#### **4. Authorities**

##### **4.1 Contracting Authority**

The Contracting Authority for the Contract is:

Name: Brandon Wright

Title: Supply Officer

Public Works and Government Services Canada

Acquisitions Branch

Directorate: Communications Procurement Directorate

Address: 360 Albert St. Constitution Square I, Floor 12, Ottawa Ontario K1A 0S5

Telephone: 613-991-1475

Facsimile: 613-949-1281

E-mail address: brandon.wright@pwgsc-tpsgc.gc.ca

The Contracting Authority is responsible for the management of the Contract and any changes to the Contract must be authorized in writing by the Contracting Authority. The Contractor must not perform work in excess of or outside the scope of the Contract based on verbal or written requests or instructions from anybody other than the Contracting Authority.

##### **4.2 Project Authority**

The Project Authority for the Contract is:

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_ - \_\_\_\_ - \_\_\_\_\_

Facsimile: \_\_\_\_ - \_\_\_\_ - \_\_\_\_\_

E-mail address: \_\_\_\_\_

The Project Authority is the representative of the department or agency for whom the Work is being carried out under the Contract and is responsible for all matters concerning the technical content of the Work under the Contract. Technical matters may be discussed with the Project Authority; however, the Project Authority has no authority to authorize changes to the scope of the Work. Changes to the scope of the Work can only be made through a contract amendment issued by the Contracting Authority.

#### **5. Payment**

##### **5.1 Basis of Payment**

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The Contractor will be reimbursed for the costs reasonably and properly incurred in the performance of the Work specified in the authorized Task Authorization (TA), as determined in accordance with the Basis of Payment in Annex A, to the limitation of expenditure specified in the authorized TA.

Canada's liability to the Contractor under the authorized TA must not exceed the limitation of expenditure specified in the authorized TA. Customs duties are excluded and Goods and Services Tax or Harmonized Sales Tax is extra, if applicable.

No increase in the liability of Canada or in the price of the Work specified in the authorized TA resulting from any design changes, modifications or interpretations of the Work will be authorized or paid to the Contractor unless these design changes, modifications or interpretations have been authorized, in writing, by the Contracting Authority before their incorporation into the Work.

## **5.2 Limitation of Expenditure - Cumulative Total of all Task Authorizations**

1. Canada's total liability to the Contractor under the Contract for all authorized Task Authorizations (TAs), inclusive of any revisions, must not exceed the sum of \$ \_\_\_\_\_. Customs duties are excluded and the Goods and Services Tax or Harmonized Sales Tax is extra, if applicable.

2. No increase in the total liability of Canada will be authorized or paid to the Contractor unless an increase has been approved, in writing, by the Contracting Authority.

3. The Contractor must notify the Contracting Authority in writing as to the adequacy of this sum:

- a. when it is 75 percent committed, or
- b. four (4) months before the contract expiry date, or
- c. as soon as the Contractor considers that the sum is inadequate for the completion of the Work required in all authorized TAs, inclusive of any revisions,

whichever comes first.

4. If the notification is for inadequate contract funds, the Contractor must provide to the Contracting Authority, a written estimate for the additional funds required. Provision of such information by the Contractor does not increase Canada's liability.

## **5.3 Monthly Payment**

Canada will pay the Contractor on a monthly basis for work performed during the month covered by the invoice in accordance with the payment provisions of the Contract if:

- a. an accurate and complete invoice and any other documents required by the Contract have been submitted in accordance with the invoicing instructions provided in the Contract;
- b. all such documents have been verified by Canada;
- c. the Work performed has been accepted by Canada.

## **5.4 SACC Manual Clauses**

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SACC *Manual* clause A9117C (2007/11/30) T1204 - Direct Request by Customer Department

## 5.5 Discretionary Audit

SACC *Manual* clause C0705C (2010/01/11) Discretionary Audit

## 6. Invoicing Instructions

The Contractor must submit invoices in accordance with the section entitled "Invoice Submission" of the general conditions. Invoices cannot be submitted until all work identified in the invoice is completed.

Each invoice must be supported by:

- a. category of services and names of resources, number of hours per category and hourly rates;
- b. a copy of time sheets to support the time claimed;
- c. a copy of the release document and any other documents as specified in the Contract;
- d. a copy of the invoices, receipts, vouchers for all direct expenses, and all travel and living expenses;
- e. a copy of the monthly progress report.

Invoices must be distributed as follows:

The original and one (1) copy must be forwarded to the Project Authority identified under the section entitled "Authorities" of the Contract.

One (1) copy must be forwarded to the Contracting Authority identified under the section entitled "Authorities" of the Contract.

## 7. Certifications

### 7.1 Compliance

Compliance with the certifications and related documentation provided by the Contractor in its bid is a condition of the Contract and subject to verification by Canada during the term of the Contract. If the Contractor does not comply with any certification, provide the related documentation or if it is determined that any certification made by the Contractor in its bid is untrue, whether made knowingly or unknowingly, Canada has the right, pursuant to the default provision of the Contract, to terminate the Contract for default.

## 8. Applicable Laws

The Contract must be interpreted and governed, and the relations between the parties determined, by the laws in force in Ontario.

## 9. Priority of Documents

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If there is a discrepancy between the wording of any documents that appear on the list, the wording of the document that first appears on the list has priority over the wording of any document that subsequently appears on the list.

- (a) the Articles of Agreement;
- (b) the general conditions 2035 (2013/04/25), General Conditions - Higher Complexity - Services;
- (c) Annex A, Statement of Work;
- (d) Annex B, Basis of Payment;
- (e) the signed Task Authorizations (including all of its annexes, if any);
- (f) the Contractor's bid dated \_\_\_\_\_, (*insert date of bid*) (*If the bid was clarified or amended, insert at the time of contract award:"*, as clarified on \_\_\_\_\_ " **or** ",as amended on \_\_\_\_\_ " *and insert date(s) of clarification(s) or amendment(s)*).

## **10. Foreign Nationals (Canadian Contractor)**

*SACC Manual* clause A2000C (2006/06/16) Foreign Nationals (Canadian Contractor)

## **11. Insurance**

*SACC Manual* clause G1005C (2008/05/12) Insurance

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## ANNEX A

### STATEMENT OF WORK

#### 1. Background

The Canadian economy has experienced one of the best performances among Group of Seven (G-7) countries since the global economic downturn. The output that was lost over the recession has been more than fully recouped and Canada has had the strongest record of growth and job creation over the economic recovery. Business investment has also rebounded strongly and Canada is the only G-7 country to have more than fully recovered business investment that was lost during the recession.

However, the global economic environment remains uncertain and downside risks continue to weigh on the outlook. Nevertheless, the Government remains on track to meet its commitment to return to balanced budgets by 2015-16.

Since 2006, the Government has taken important steps to support jobs and growth, including making Canada a competitive low-tax jurisdiction. Economic Action Plan 2013 announced a set of measures that will drive economic growth and prosperity, by:

- Connecting Canadians with available jobs
- Helping manufacturers and businesses succeed in the global economy
- Creating a new Building Canada Plan
- Investing in world-class research and innovation; and
- Supporting families and communities.

The advertising initiative will broadly inform Canadians about the benefits of Canada's Economic Action Plan and its various measures and where and how to learn more about them. The individual advertising initiatives will be aligned under and carry Canada's Economic Action Plan brand.

#### 2. Advertising Objectives

The purpose of this advertising initiative is to inform Canadians about key initiatives, programs and benefits under Economic Action Plan 2013, which may include advertising Budget 2014. The advertising will also serve to strengthen ongoing consumer confidence in the Canadian economy and the direction of the country.

If needed, campaigns will be tailored and operationalized to achieve stated objectives, with optimal exposure of the initiatives being advertised and maximum value for money. Generally, all media (including but not limited to TV, radio, print, web, outdoor advertising, and tactics such as direct mail and individual advertising opportunities (e.g. specialty inserts) should be considered when planning the advertising campaign.

These objectives are to be achieved through the planning, creative development, implementation, evaluation and maintenance of the advertising campaign and related activities that support Canada's Economic Action Plan.

The objectives of advertising will be to:

- Raise awareness among Canadians of key initiatives, programs and benefits under Canada's Economic Action Plan.

- Direct Canadians to Government information sources –the Economic Action Plan web site, 1-800 O-Canada – where they can obtain detailed information on specific initiatives.
- Help to Increase consumer confidence in the Canadian economy.

### 3. Measuring Effectiveness

The success of the advertising campaigns will be measured based on the following:

- Awareness/recall of the campaigns; and
- Increased number of visits to the appropriate websites.
- Increased number of calls to 1-800-O-Canada

The Department of Finance will use a combination of quantitative and qualitative mechanisms to measure the effectiveness of the advertising campaigns, including:

- Concept/creative testing (either focus groups or online testing) to ensure that creative materials resonate with the target audiences in order to achieve the desired objective prior to finalizing creative materials;
- Advertising Campaign Evaluation Tool (ACET), a standardized, Government of Canada evaluation tool, to measure ad recall (aided and unaided), awareness of the specific messages, and differences in awareness and opinion between those who saw and those who had not seen the advertising campaign; and
- Website and call centre metrics.

### 4. Key Messages

- Canada's Economic Action Plan contains measures and programs that are helping to grow our economy, fuel job creation and increase Canada's long-term prosperity.
- Economic Action Plan 2013 introduces new measures to achieve these goals, including the Canada Job Grant and other initiatives to connect Canadians with available jobs, the largest and longest federal infrastructure plan in Canadian history, and significant new investments to support manufacturing and innovation in Canada.
- The Economic Action Plan bolsters the fundamental strengths and resilience of the Canadian economy and addresses the future priorities of Canadians, while keeping taxes low and returning to balanced budgets by 2015-16.

### 5. Target Audience

All Canadians (sub-audiences TBD based on particular requirements of each ad campaign).

### 6. Services Requirements, Tasks and Deliverables

To support the Department of Finance advertising objectives the Project Authority (PA) requests a Contractor who can provide integrated advertising and marketing services and day-to-day account management services, as and when requesting basic, in the following areas:

The advertising campaigns must communicate to the target audiences using a variety of mass media including, but not limited to TV, radio, print, web, outdoor advertising, and tactics such as direct mail and individual advertising opportunities (e.g. specialty inserts) should be considered when planning the advertising campaign. It may also include various partnership/marketing activities and collateral products in order to broaden the reach of the advertising campaigns.

#### (a) Account management and coordination services:

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The requirement is to provide continuous day-to-day account support to the Project Authority to articulate and manage approved Finance Canada strategies/plan, partnership/marketing activities and communication campaigns and media plans, as well as creative design and manipulation requirements. The scope of work includes providing the necessary personnel to handle and deliver materiel related to the daily requirements of the Economic Action Plan (EAP) advertising objective campaigns.

(b) Strategic services:

The requirement is to design, articulate, manage and implement the strategy for the EAP Brand to ensure that it effectively relates and motivates the target audience. Develop media strategies that respond to the needs of the objectives and strategic direction, specific to partnership/marketing materials.

(c) Creative and production services:

In addition to working with the existing creative artwork, the Contractor will be required to conceptualize, design, produce (drafts to final), and duplicate for distribution, all advertising creative materials for advertising campaigns.

The Project Authority will determine the minimum number of creative design concepts for review that it will require the Contractor to produce. The Project Authority will provide research, applicable objectives and other applicable documentation to allow the Contractor to fully develop the concepts.

(d) Media services:

The requirement is to develop media plans for each campaign. This involves translating the communication strategy for each campaign into a detailed media "action plan".

(e) Advertising Campaign Evaluation

If requested, the Contractor must provide background information and materials, in both electronic and hard copy formats in all required languages, to other Contractors of the Government of Canada to test advertising campaign creative concepts as well as to evaluate audience impact.

The Contractor may be working under very short timeframes as most of the requests are on an urgent basis. No rush charges will be paid as it is understood that this is the nature of the work.

## 6.1 Project Schedule

The Contractor shall provide services to meet the Department Finance objectives within three (3) distinct periods of the contract:

- (a) Initial contract period: From contract award date to March 31, 2014.
- (b) Option Period 1: From April 1, 2014 to March 31, 2015.
- (c) Option Period 2: From April 1, 2015 to March 31, 2016.

## 7. Services Required

The Department of Finance has determined the following services categories to be requisite for the provision of Advertising services in relation to this requirement:

### **Account Management and Coordination Services**

Account management  
Account coordination  
Partnerships

### **Strategic Services**

Strategic planning and development  
Media strategy and direction

### **Creative and Production Services**

Creative direction

Graphic design

Copy writing (English or French)

Copy editing (English or French)

Translation and adaptation

- English or French
- Aboriginal languages
- Ethnic languages

Proofreading

- English and French
- Aboriginal languages
- Ethnic languages

Production management for:

- Print
- Broadcast
- Out-of-Home
- Digital
- Cinema

Production Services for:

- Print
- Broadcast
- Out-of-Home
- Digital
- Cinema

### **Media Services**

Media research

Media planning and coordination

Media distribution

It is important to note that PWGSC is responsible for coordinating GC public opinion research and provides advisory services to federal departments and agencies through its Public Opinion Research Directorate (PORD). Therefore, public opinion research does not form part of this requirement.

Regardless of position titles, all individuals proposed for each category of service must meet the minimum level of qualification for that category of service. Should the proposed individual(s) not meet the minimum level of qualification, the individual(s) will not be authorized to perform work for any resulting contract against a Supply Arrangement.

## **7.1 Account Management and Coordination Services**

### **7.1.1 Account Management**

The designated resource providing account management services will be responsible for the following:

- Work on the day-to-day development and execution of account management and coordination services.
- Ensure that all procedures under each contract have been followed and correct documentation is in place.
- Document all activities in all categories of service and all direct costs that include the level of effort (time and resources) to deliver the services required by the PA.
- Adhere to all procedures (including budgets, time, and staff resources) and ensure that correct documentation is in place.
- Ensure that changes to the SOW are documented and approved by the PA, and that amendments to the contract are issued by the Contracting Authority prior to the work being done.
- Manage on a day-to-day basis all resources working on the development and production of advertising and marketing/partnership materials.

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- Work cohesively with colleagues in order to deliver good value for money to the GC on a timely basis.
- Attend client briefings and meetings, and participate in conference calls as required.
- Provide cost reports detailing the monitoring of developing campaigns, budgets and work schedules; produce timely estimates for approval; advise of budget variances.
- Facilitate creative production and ensure all creative elements have the PA's approval prior to production.
- Supervise and report on any work produced by approved sub-contractors.

### **7.1.2 Account Coordination**

The designated resource providing account coordination services will be responsible for the following:

- Provide continuous account support to the PA to deliver all of the advertising components as detailed in the SOW.
- Assist the designated resource responsible for account management in the accomplishment of his roles and responsibilities which include, but are not limited to:
  - Attending client briefings and meetings (upon request);
  - Providing contact reports and budget reports detailing the monitoring of developing campaigns;
  - Providing budgets and timetables;
  - Producing timely estimates for approval;
  - Advising of budget variances;
  - Facilitating creative production.

### **7.1.3 Partnerships**

Partnerships or collaborative arrangements may be sought to increase the visibility and overall success of a GC advertising campaign. These partnerships can take many forms and can include participation from media suppliers.

Within the scope of developing partnerships, on an as required basis and subject to approval from the PA, the designated resource providing partnership or collaborative arrangements development services will be responsible for the following:

- Outline the potential types of partnership(s).
- Develop and propose the objectives, key elements and goals of the partnership(s).
- Identify potential partners.
- Inform the AOR if media suppliers are identified.
- Oversee various aspects of the partnership(s) which may include, but are not limited to:
  - Developing the request for proposal or letter of agreement or other partnership documentation for approval by the PA;
  - Consulting with the AOR on all media elements including evaluation of media opportunities, as required;
  - Distributing the request for proposal or a letter of agreement or other partnership documentation to potential partners, as required;
  - Participating in the evaluation of the proposals led by the PA, as required;
  - Communicating with partners on behalf of the GC;
  - Developing partnership materials for approval by the PA;
  - Distributing relevant materials to partners;
  - Evaluating partnership activities and briefing the PA on performance and results.

The AOR is the sole agent mandated to negotiate with media suppliers on behalf of the GC. Within this context, the Contractor must contact the AOR to initiate any and all negotiations with media suppliers for media opportunities.

## **7.2 Strategic Services**

### **7.2.1 Strategic Planning and Development**

The designated resource providing strategic planning and development services will be responsible for the following:

- Develop a strategy or communication plan for advertising services to assist in creating public awareness of and/or encouraging a call to action for products, services or issues of the GC, which may require expertise in specific areas as determined in the Contract.
- Work in collaboration with the designated resource providing media strategy and direction to:
  - Provide advice and guidance on the use of new and emerging media, and methods of execution.
  - Use information provided in the SOW to prepare the overarching strategy and/or communication plan. The Contractor may also need to provide secondary research and analysis data on which to base advertising strategies and/or communication plans. These can include, but are not limited to:
    - Consumer and market research
    - Target market analysis
  - Detail the objectives, strategies and execution that will be undertaken in the advertising strategy and/or communication plan. It should include measures to assess the effectiveness of the advertising to determine if it meets objectives. It can include:
    - Marketing and advertising objectives
    - Branding
    - Target audience
    - Key messages
    - Creative strategy and concepts (artwork and layout)
    - Recommendation for research and creative pre-testing, as required
    - Media strategy
    - Budget
    - Timing
    - Rationale
    - Deliverables
    - Indicated actions and next steps
    - Evaluation process
- Ensure the advertising strategy and/or the communication plan are actionable with validated support and ideas that are aligned.
- Ensure the advertising strategy and/or communication plan has signed authorization by the PA prior to implementation.

### 7.2.2 Media Strategy and Direction

The designated resource providing media strategy and direction services will be responsible for the following:

- Develop media strategies and tactical plans that are rationalized and supported by media analyses and consumer insights.
- Develop media strategies that respond to the objectives of the campaign **and optimize cost efficiencies and effectiveness**. Consideration of all traditional and non-traditional media channels **and their role in the overall communication strategy (paid, owned and earned)** is essential.
- Work in collaboration with the designated resource responsible for strategic planning and development to:
  - Provide advice and guidance on the use of new and emerging media, and methods of execution;
  - Use information **from the creative and media briefs, consumer and market research, media industry research tools (e.g. Print Measurement Bureau, NadBank, Nielsen Media Advisor, Comscore, etc.) and proprietary research to develop media insights to inform** the strategy and/or communication plan. Provide the basic components, rationale and research support for the following:
    - Media objectives
    - Target demographics
    - National coverage

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- Campaign timing
- Media selection
- Audience receptivity
- Recommended media weights
- Media estimates
- Recommended reach and frequency
- Media properties
- Media costs by property
- Total media budget
- Media distribution plan
- Other function/responsibilities

## **7.3 Creative and Production Services**

### **7.3.1 Creative Direction**

The designated resource providing creative direction services will be responsible for the following:

- Oversee and provide direction on overall quality of all creative elements, concepts, development, and production of all advertising products as well as any marketing/partnership materials developed in support of the advertising products.
- Work directly with the client institutions and be responsible for designing concepts for GC advertising campaigns and other marketing/partnership needs.
- Attend client briefings and meetings, and participate in conference calls as required.
- Assign, direct and supervise all aspects of the production team including copywriting, graphic design, copy editing, proofreading, translation and adaptation, management, and production services.
- Oversee and provide direction for all creative work produced by sub-contractors.

### **7.3.2 Graphic Design**

The designated resource providing graphic design services will be responsible for the following:

- Develop creative concepts with copy and artwork, as well as facilitate the production of all creative materials needed to satisfy the objectives contained in the advertising strategy and/or communication plan.
- Create broadcast, digital, out-of-home, cinema, and print advertisements to inform the public of government programs and services.
- Work in collaboration with the designated resource responsible for creative direction, to advise the client where and when to use existing assets and when original work may be required.
- Provide a range of creative services that can accommodate highly targeted applications (e.g., business-to-business, health care, science and technology, recruitment, etc.).

### **7.3.3 Copy Writing (English or French)**

The designated resource providing copy writing services will be responsible for the following:

- Direction and overall quality of all copy elements from concepts to final products, including advertising products and marketing/partnership materials.
- Create new copy and/or provide revisions to existing copy of all materials in both official languages.
- Ensure messaging is consistent with the target audience(s).

### **7.3.4 Copy Editing (English or French)**

The designated resource providing copy editing services will be responsible for the following:

- Copy editing for a variety of media such as broadcast, digital, out-of-home, cinema, and print.
- Provide copy editing for media in one of the official languages.
- Ensure messaging is consistent with the target audience(s).

### 7.3.5 Translation and Adaptation

The designated resource providing translation and adaptation services will be responsible for the following:

- Provide or manage the translation and adaptation of materials in both official languages.
- Provide or manage the translation and adaptation of materials into Aboriginal languages, as and when required.
- Provide or manage the translation and adaptation of materials into ethnic languages, as and when required.

### 7.3.6 Proofreading (English and French)

The designated resource providing proofreading services will be responsible for the following:

- Provide proofreading of copy to ensure accuracy.
- Provide proofreading of copy to ensure the proper equivalency is maintained between the two official languages.
- Manage proofreading of materials that have been translated into ethnic/Aboriginal languages, as and when required.

### 7.3.7 Production Management

The designated resource providing production management services will be responsible for the following:

- Provide production management services for multi-media advertising products such as, but not limited to, broadcast, digital, out-of-home, cinema, and print, as well as marketing/partnership materials
- Ensure production supervision and quality control of materials, including work that is outsourced for broadcast, digital, out-of-home, cinema, and print, as well as marketing/partnership materials.
- Take into consideration creative content constraints including (in section 10.3 of Annex A)

- Supply experienced production management services including, but not limited to:

- Print:

- Newspaper
- Magazine
- Marketing/partnership materials

- Broadcast:

- Television
- Radio

- Out-of-home:

- Transit ads
- Closed circuit / digital advertising

- Digital:

- Internet ads
- Interactive media
- Ad words

- Cinema

- Provide production management services including, but not limited to:
  - Accurately estimating costs;
  - Negotiating with production sub-contractors;
  - Establishing contingency plans in case of unforeseen events;
  - Following required tendering processes for sub-contracting;
  - Obtaining legal clearance for intellectual property;
  - Negotiating copyright on behalf of the Crown;
  - Casting, negotiating, contracting and paying talent and residuals; and

- Obtaining and documenting talent releases.

### 7.3.8 Production Services

The designated resource providing production services will be responsible for the following, but not limited to:

- Cinema production
- Print production
- Broadcast production:
  - TV and audio production
  - Video and audio duplication
- Digital production
- Out-of-home production
- Marketing/partnership material products

All "Studio Services" including items such as file retrieval, burning CDs, uploads to extranet, mounting and mock-ups, etc., to support the development of advertising and marketing/partnership materials must be included within the production services category of services under the areas of service identified above.

## 7.4 Media Services

### 7.4.1 Media Research

The designated resource providing media research services will be responsible for the following:

- Research availability of media.
- Research demographics, target audiences, and market trends.
- Research new and emerging media.

### 7.4.2 Media Planning and Coordination

The designated resource providing media planning and coordination services will be responsible for the following:

- Develop media plans that respond to the needs of the communication plan and/or advertising strategy objectives including, but not limited to:
  - Campaign timing;
  - Media selection and rationale including:
    - Recommended media placement for television, radio, cinema, print, and digital media;
    - Recommended media placement for out-of-home materials by type of product (e.g., transit posters, billboards, digital screens), and traffic/audience exposure;
    - Media weights and ad size;
    - Media costs;
    - Reach and frequency;
    - Media properties;
    - Media costs by property;
    - Total media budgets by media;
    - Flight plan; and
    - Flow chart of activity and media exposure such as Gross Rating Points (GRPs) and readership.
- Produce all media plans in accordance with the media plan template provided by PWGSC.
- Ensure a close working relationship with the AOR by:
  - Using the appropriate AOR planning cost guides; and
  - Briefing the AOR on media plan specifications.

- 
- Facilitate media plan sign-off. All media plan recommendations must have signed approval by the PA. It is the responsibility of the advertising agency to ensure that all media negotiations and placements are only made through the AOR.
  - Develop accurate cost estimates and budget control of all media activities for easy client access and retrieval.
  - Develop media plans in compliance with the Official Languages Act.
  - Work in collaboration with the designated resource providing media strategy and direction to:
    - Analyze and interpret pre-buy reports prior to air date and publication date, to demonstrate the successful execution of the media strategy, for the purpose of updating the client on campaign delivery.
    - Analyze and interpret post-buy reports on outcome of campaign for the purpose of updating the client on campaign delivery and performance.
  - Review and approve AOR reports and recommendations received periodically and provide timely responses to the client institution via email or revised media plans for implementation.
  - Develop list of positive and negative keywords and text links.
  - Work in collaboration with the designated resource providing media research to:
    - Research the availability of media;
    - Research demographics, target audiences, and market trends;
    - Research new and emerging media.

#### **7.4.3 Media Distribution (Trafficking):**

The designated resource providing media distribution services will be responsible for the following:

- Compile list of media distribution (i.e., trafficking) contact information for delivery of creative(s).
- Ensure delivery of creative(s) in proper formats to each media outlet in a timely fashion.

Ad server services are not included in this requirement. This service is covered under contract with the AOR responsible for all services related to ad servers.

## **8. Responsibilities of the Department of Finance**

The Project Authority at the Department of Finance will:

- Provide past campaign materials, such as printed artwork, logos, footage, etc. to the Contractor to ensure a smooth transition;
- Work with the Contractor to develop strategies consistent with other communications and marketing initiatives across government;
- Review materials submitted by the Contractor and work with the Contractor to revise and enhance the material according to the agreed upon processes and timelines;
- Work with the Contractor to adjust and adapt the campaign based on the results of research activities, such as surveys and focus group studies, designed to measure the qualitative and quantitative effects of the campaign on an ongoing basis;
- Coordinate the overall project, providing, as required, feedback, direction and guidance to the Contractor, and accepting and approving the Contractor deliverables on behalf of the Agency;
- Ensure that the appropriate subject-matter experts from within the Department of Finance (and other relevant departments, as required) are available to the Contractor to discuss and provide material, as well as facilitate cooperation with other relevant departments', as required;
- Provide the Contractor with the animated Canada wordmark and any other logos to be used in the television creative as well as in other media, as required;
- Provide other assistance or support as required; and

- Ensure that approvals from within the Department of Finance and from the central agencies are provided in accordance with the agreed-upon processes and timelines.

## 9. Other Requirements and Information

### 9.1 Performance Standards

All work carried out under any resulting contract is to be performed to the satisfaction of the Project Authority or this person's designated representative in accordance with the terms and conditions of the contract and approved estimates.

Should any part of the creative or messaging not be satisfactory, the Project Authority may request that it be corrected or changed before approving payment.

The Contractor will ensure compliance with the relevant legislation of all Canadian jurisdictions where the advertising and collateral materials will be used.

### 9.2 Reporting Standards

The Contractor shall report to the Project Authority. Weekly status reports detailing all projects being worked on indicating current status, next steps, agency and client teams, and due dates will be submitted to the Project Authority, as well as contact reports detailing overall discussion points and decisions.

Monthly cost reports, including overall summary of costs incurred to date on each planned project and forecasted final projected cost as compared to estimates and overall budgets, will be submitted to the Project Authority.

Following the acceptance of the Strategic Plan by the Project Authority, and in consultation with the Contractor, a timeline for delivery and presentation of work including campaign briefs, weekly status reports, monthly budget reports, and contact reports as requested by the Project Authority, as well as post-campaign reports in a timely fashion will be established.

The Contractor's financial reporting of project budgets, monthly budget reports, and post-campaign reports shall be based on general purpose financial statements that meet the needs of all potential readers, and be prepared in accordance with Generally Accepted Accounting Principles (GAAP).

### 9.3 Communications

In addition to the timely submission of all deliverables and fulfillment of obligations specified within each period of the project, it is the responsibility of the Contractor to facilitate and maintain regular communication with the Project Authority.

In addition, the Contractor is to immediately notify the Project Authority of any issues, problems, or areas of concern in relation to any work completed under the Contract.

### 9.4. Software Standards

At a minimum, and unless specified otherwise, the Contractor should be proficient with Adobe (including Adobe Illustrator, Adobe Photoshop, Adobe PremierePro, Adobe FireWorks, and Adobe Flash) for the various advertising media that it is required to produce. As well the Contractor must be able to provide all required deliverables in electronic format compliant with the Department of Finance software suite:

- (1) Word processing - MS Word 2003, MS Word 2010
- (2) Spreadsheet - MS Excel 2003, MS Excel 2010
- (3) Presentation - MS PowerPoint 2003, MS PowerPoint 2010
- (4) Media - MS Media Player Version 10 (or higher), Flash 8 (or higher), WMV files
- (5) PDF - Adobe Acrobat Reader v8 (or higher)
- (6) Video (FLV, MP4, 16 x 9 widescreen\*\*)

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**\*\*Additional requirements:**

- Provide closed captioning (XML file) in W3C's SMIL 2.0 format, with time specified in seconds, for example: [p begin="00:00:100.40" end="00:00:106.60"]; If possible, for YouTube, the captioning should be presented in minutes, for example: [p begin="00:01:40.40" end="00:01:46.60"]. If not possible, the Department of Finance will adjust the XML file for YouTube purposes.
- Provide transcripts in Word format
- Provide copies or originals of the source files [VOB file (Video Object) or other formats used for recordings] after editing, in digital format
- Ensure that the video is optimized for a bitrate of 150 kilobytes per second (kbps)

In addition, the Contractor must have the ability to upgrade/change their software in response to the Department of Finance's changes to their standard software throughout the period of the contract.

### **9.5 Green Procurement**

All projects should be delivered in an environmentally responsible manner, to the fullest extent possible. Clients and suppliers will be encouraged to transmit work requests electronically.

All non-electronic correspondence and deliverables should be certified as originating from a sustainable managed forest and/or with a minimum of 30% recycled content and processed chlorine free, whenever possible. Double-sided photocopying will be the default unless otherwise specified by the Project or Contracting Authority. Photocopied documents are to be in black and white format unless otherwise specified.

The supplier will be encouraged to provide proofs for client review and approval either on-screen or by e-mail, CD, DVD or ZIP file, wherever possible. Should printed material be required, double-sided format will be the default unless otherwise specified by the client.

### **9.6 Language**

The Contractor must have the capability of working and liaising in both official languages for the purposes of discussing, planning, organizing, producing and implementing communication plans, partnership/marketing activities, creative and media plans with the Department of Finance personnel, partners, media suppliers, and the AOR.

### **9.7. Meetings, Location of Work and Travel**

The Contractor will be asked to participate in meetings, by phone or in person, with various audiences. Many of the meetings will involve examination, assessment and refinement of advertising and partnership/marketing materials. In addition, the requirement for this examination may, from time to time, arise on an urgent basis.

The Department of Finance will pay reasonable travel expenses for the Contractor's representative(s) in accordance with Treasury Board Travel Guidelines at the time of travel to attend these meetings in person, and when requested for the regular design, development and delivery of advertising, partnership and marketing programs, including the Contractor's mandatory participation in creative research if required.

Where travel is deemed necessary, the Contractor will submit a cost estimate before travelling. All related approvals by the Project Authority must be acquired prior to travel.

## **10. Work and Contract Constraints**

Contractors should be aware of the following constraints that will affect how the work must be done:

### 10.1 Policies and Acts Constraints

The GC implements advertising in compliance with procedures and regulations of the Communications Policy of the Government of Canada, the Federal Identity Program Policy (Section 5(6) and Appendix A, sub-sections 3.2, 3.3), the Contracting Policy, the Official Languages Act (Articles 7, 11, 12, 13, and 30), the Multiculturalism Act, Common Services Policy, the Privacy Act, and the Standard on Web Accessibility (see section A.7 - Reference Web Sites).

The Contractor must maintain financial records in support of each government institution's responsibilities under the Financial Administration Act and provide information in support of each government institution's responsibilities under the Access to Information Act. See A.7, Reference Websites.

### 10.2 Approval Process Constraints

All advertising campaigns for the Government of Canada are coordinated centrally by the Privy Council Office (PCO) and Public Works and Government Services Canada (PWGSC).

The Department of Finance will work with the Contractor to develop materials required for each campaign. The Contractor will submit proposed concepts (consisting of messages and creative), all strategies (advertising and supporting partnership/marketing strategies), media strategies, media plans and all related materials to the Project Authority for written approval. A multi-level approval process is followed within the Department of Finance. The Project Authority will be responsible for written approvals of all work, receiving all final deliverable materials and verifying that value for money has been obtained.

The Contractor must not forward materials to the Government of Canada's Agency of Record (AOR) or to media outlets before receiving the Project Authority's written approval and the AOR's email acknowledgement of receipt of WA and list of stations purchased, as applicable. Note that traffic instructions are the responsibility of the Contractor. The Project Authority will also obtain the required approvals from central agencies.

Revisions are likely and will be executed according to agreed-upon processes and timelines. Ongoing marketing research, such as surveys and focus group and/or online creative studies, designed to measure the qualitative and quantitative effectiveness of the campaign, may also require the Contractor to adjust and adapt the campaign.

#### *Project Authority*

The Project Authority resides at the Department of Finance and will acquire appropriate approvals from senior management at Finance, and from the Government of Canada central agencies. The Contractor may be asked to provide presentation materials and/or present the material to assist in obtaining approvals. It should be noted that:

- All phases of development of advertising and partnership/marketing strategies and plans must be vetted through the Project Authority;
- Development of advertising, partnership/marketing and related materials requires internal approvals within the Department of Finance. The Minister's Office must be involved throughout this process. These levels of approval may result in longer timeframes for approval prior to proceeding with specific projects; and
- These same materials require approvals by the Government of Canada's central agencies. These approvals may also result in longer timeframes for approval prior to proceeding with specific projects.

The name of the Project Authority will be provided once the contract is issued. The Project Authority will communicate approvals to the Contractor.

### 10.3 Creative Constraints

All television and cinema advertisements must contain the Canada Wordmark as the last image of the advertisement, and the image must remain on the screen for 4 seconds.

Approved animation of the flag symbol precedes the static form of the Canada Wordmark in television and cinema advertisements.

All television, cinema and radio advertisements must end with the narration: "A message from the Government of Canada" in the language of the advertisement.

Approved musical signature (first 4 notes of "O Canada", lasting 1.5 seconds), must play following the audio signature "A message from the Government of Canada".

For television and cinema advertisements, the voice-over must be announced over a static screen image of the Canada Wordmark by itself and be at least 2.5 seconds in duration.

All digital and print advertisements, including marketing/partnership materials, must contain the appropriate Federal Identity Program (FIP) corporate signature, as well as the Canada Wordmark. To learn more about FIP, please consult the following Web site:

[http://www.tbs-sct.gc.ca/fip-pcim/index\\_e.asp](http://www.tbs-sct.gc.ca/fip-pcim/index_e.asp) .

The PA is to provide any logos to be used.

#### *Internet Display Ads*

Ripple technology is used by the AOR to track delivery of rich media creative. Online documentation is available for banner developers at <http://groups.google.ca/group/adcentric-ripple>.

Ads must use one of Ripple's 3 standard architectures:

- Banner: regular in-page banner.
- Expandable: regular banner that can be expanded in the page. In Ripple, this consists of 2 separate files - collapsed (small) and expanded (large).
- Top Layer Ad (TLA): similar to the banner, except that it appears over the page content for a certain amount of time.

Additional production notes:

- Ripple must be installed before building any rich media ad.
- Flash development must use AS2 until further notice, as determined by the Interactive Advertising Bureau of Canada (IAB).
- The frame rate must be either 18 or 30 frames per second (fps).
- The production team must contact the AOR in the case of dynamic content based on external data or combinations (several banners talking to each other).
- Allow at least five working days for testing and trafficking (programming) of a standard creative and at least 10 working days for a rich media creative. These timelines are required to validate both production and delivery issues with the sites. If a problem is detected and it is production related, the creative will be returned to the Contractor to be corrected. If the problem is related to serving the creative, the AOR will resolve the issue.

For the Web-site tracking requirements, URL tags can be supplied to the AOR so that they are programmed into the AOR's ad server. They can be provided on the Government of Canada media planning template with the required site and banner information.

#### 10.4 Media Planning Constraints

All media plans produced by the Contractor must be compliant with the Official Languages Act. Furthermore, in line with the Communication Policy, institutions must determine their obligations under Sections 11 and 30 of the Official Languages Act to ensure compliance in all advertising. Moreover, institutions must respect the GC's commitment, stated in Part VII of the Act, to enhance the vitality of official language minority communities. Advertising plans and campaigns must address the needs, concerns and language preferences of such communities. Media buys must include the purchase of advertising space and time in media serving a community's official language minority, be it English or French.

Where a federal institution is engaged in communications with members of the public, it shall communicate by using the appropriate media in order to reach members of the public in the official language of their choice in an effective and efficient manner that is consistent with the purposes of the Act.

Where there is no specific media available in one official language (such as print for example), another media, such as radio, may be used to complement the placement in the other official language.

The Contractor may be required to produce ads in ethnic languages, as requested by the Project Authority.

When implementing the media plan approved by the Department of Finance, the Contractor must co-ordinate its activities with the Government of Canada's AOR for all media placements. The Contractor will use the official Government of Canada media plan template.

#### Internet:

To ensure best possible efficiencies and quality control on the delivery and reporting of all Government of Canada internet activities, the Government of Canada has centralized the management of the following through the AOR:

- search engine marketing (SEM) and keyword optimization; and
- trafficking and/or monitoring delivery of Internet display creative.

#### SEM or keyword optimization:

- A media strategy, positive and negative keywords, and text links are required for all media plans. The AOR will provide recommendations to optimize from that point forward, based on the Work Authorization (WA) parameters.
- The AOR requires a minimum of 7 working days after the date of receipt of the WA to book the campaign. This timeline is required to obtain mandatory approvals from search engines, as applicable.

#### Internet Display (Standard and Non-Standard):

Note:

- Standard placements are those that can be hosted by the AOR's ad server.
- Non-Standard placements are those that cannot be hosted by the AOR's ad server.
  - If the Contractor is unsure whether a placement is Standard or Non-Standard, they must contact the AOR.
- Estimated impressions or clicks must be indicated in all media plans.

a) Standard internet display

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- File size of creative must be indicated in all standard media plans. The breakdown in file size is the following:

<b>Total Display Ad File Size</b> (including all files called up by the ad)
Under 30K
30K - 300K
300K - 2.2mb
2.2mb - 4.4mb
Over 4.4mb

b) Non-Standard Internet display

- File size of creative is not required in Non-Standard media plans; however, you must indicate if the media is to be purchased on a CPM or CPC basis and whether the AOR is to track clicks and/or impressions.

The Contractor must use the media lists provided by, and available from, the AOR.

## 11. Reference Web Sites

Public Works and Government Services Canada:  
<http://www.pwgsc.gc.ca>

Communications Policy of the Government of Canada (regarding advertising):  
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12316>

Official Languages Act and Access to Information Act:  
<http://www.justice.gc.ca>

Federal Identity Program:  
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12314>

Contracting Policy:  
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=14494>

Multiculturalism Act:  
<http://laws-lois.justice.gc.ca/eng/acts/c-18.7>

Common Services Policy:  
<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12025&section=text>

Privacy Act:  
<http://laws-lois.justice.gc.ca/eng/acts/P-21/index.html>

Standard on Web Accessibility:  
[Http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=23601&section=text](http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=23601&section=text)

## ANNEX B

### BASIS OF PAYMENT

#### NOTE TO BIDDERS:

Bidders must submit an hourly rate for each of the three (3) key categories of services and one single blended hourly rate (see table below under B.1) The single blended hourly rate to be submitted is the rate Bidders will charge for any of the following services:

- Account Coordination
- Partnerships
- Strategic Planning & Development
- Graphic Design
- Copywriting
- Copy Editing
- Translation & Adaptation
- Proofreading
- Production Management
- Production Services
- Media Research
- Media Planning & Coordination
- Media Distribution

The names of resources which will be identified in any resulting contract must meet the minimum requirements for the category of service for which they are being proposed, as described in Annex "A" - Statement of Work, Section 4. Services Required.

The Bidder will be paid in accordance with the following Basis of Payment for Work performed pursuant to any resulting contract.

Bidders must include all agency charges in their hourly rates as no other agency fee or commission will be payable above these rates.

The hourly rates are firm and will be used in the evaluation.

#### B.1 HOURLY RATES

The firm hourly rates are all inclusive. They include the cost of labour, fringe benefits, general and administrative expenses, overhead, profit and the like, excepting only GST and HST if applicable. All expenses normally incurred in providing the services (i.e., project office space [including Offeror's hardware and software], word processing, reports, work estimates, photocopying, courier and telephone charges, local travel and the like) are included in the firm hourly rate identified hereunder, and will not be permitted as direct charges under any contract. **The Bidder is not permitted to charge hourly rates to prepare work estimates.**

The rates are in Canadian currency, Customs and duties are included, and Harmonized Sales Tax (HST) is extra, if applicable.

Category of Service	NAME OF RESOURCE(S)	HOURLY RATE INITIAL	HOURLY RATE	HOURLY RATE
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		1-YEAR PERIOD	EXTENSION PERIOD 1	EXTENSION PERIOD 2
Account Management	To be identified in each TA	\$ _____	\$ _____	\$ _____
Media Strategy and Direction	To be identified in each TA	\$ _____	\$ _____	\$ _____
Creative Direction	To be identified in each TA	\$ _____	\$ _____	\$ _____
Blended Hourly Rate	Identification not required	\$ _____	\$ _____	\$ _____

## B.2 PRODUCTION COSTS

The production costs are costs associated with the production of the ads and marketing/partnership activities and products, excluding the professional fees billed as hourly rate.

Production costs will be reimbursed at cost, as subcontracted services and direct expenses.

### B.2.1 SUBCONTRACTED SERVICES

The Bidder will be reimbursed at cost for any actual expenditures reasonably and properly incurred to acquire goods and services from outside suppliers at the suppliers' price, net of any trade or prompt payment discounts.

**For each subcontracted service over \$25,000.00 (GST/HST included),** during the life of the contract which includes the option periods, the Bidder will obtain competitive bids from no less than three outside suppliers. The Bidder must provide to the Contracting Authority and the Project Authority, the names of the suppliers who submitted bids, the total amount of each bid obtained, the selection criteria, and the results.

### B.2.2 DIRECT EXPENSES

The professional fees submitted in B.1 are all inclusive.

The Bidder will be reimbursed for expenses not covered in the Hourly Rates, in certain cases and at the sole discretion of Canada, where services outside of normal overhead expenses are required to complete the Work. Such expenses may be allowable as direct expenses given the service(s) is/are documented upon approval of the Estimate. These expenses will be reimbursed net of any discounts, with no mark-up, provided the costs are approved in advance by the Project Authority and they are reasonably and properly incurred in carrying out production and advertising services.

## B.3 TRAVEL AND LIVING EXPENSES

The Contractor will be reimbursed its authorized travel and living expenses reasonably and properly incurred in the performance of the Work, at cost, without any allowance for profit and/or administrative overhead, in accordance with the meal, private vehicle and incidental expenses provided in Appendices B, C and D of the National Joint Council Travel Directive and with the other provisions of the directive referring to "travellers", rather than those referring to "employees".

All payments are subject to audit by Canada.

All travel must have prior authorization of the Project Authority.

## B.4 CONTRACTUAL JOINT VENTURE (IF APPLICABLE)

The Bidder is a contractual joint venture and the signatories are acting and responsible jointly and severally. The payment of monies under the Contract to the identified lead member, (insert name), shall be deemed a payment to all signatories and furthermore, will act as a release from all parties. In addition,

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it is agreed that giving notice by Canada to the identified lead member shall be deemed notice to all parties.

## ANNEX C

### TECHNICAL AND FINANCIAL EVALUATION

#### C.1 MANDATORY TECHNICAL CRITERIA

The Bidder MUST meet all the mandatory requirements of the RFP.

##### C.1.1 EXPERIENCE OF THE BIDDER

The Bidder MUST submit two (2) examples of advertising/marketing campaigns which were completed\* within the last three (3) years of the bid closing date. For each example, the Bidder MUST provide two (2) electronic copies of associated creative samples.

The two (2) examples must be as follow:

- One (1) national\*\* advertising campaign using at least Television and the Internet
- One (1) national\*\* advertising campaign that contains online elements\*\*\*, including traditional web, interactive and social media

\*Completed advertising/marketing campaign is one for which the planning and production have been completed, tactics have been executed, and measured results are known.

\*\*A national campaign is a campaign delivered in at least four(4) regions of Canada. One of these 4 regions must be Quebec. The regions are: British Columbia, Prairies (Alberta, Saskatchewan, Manitoba), Ontario, Quebec, Atlantic (New Brunswick, Nova Scotia, Prince Edward Island, Newfoundland and Labrador), and the Territories (Yukon, Northwest Territories, Nunavut).

\*\*\*Traditional web marketing includes one or more of the following: search engine optimization (SEO), paid search, banner ads, take-overs.

Interactive web marketing includes one or more of the following: rich media advertising (smart phone and desktop) and animated videos.

Social Media marketing includes one or more of the following: building brand presence through the development of creative and content for outlets like Twitter, Facebook, YouTube

##### C.1.2 KEY PERSONNEL

The Bidder MUST propose a minimum of one (1) but not more than three (3) resources per key personnel category.

The minimum years of experience for proposed resources per category are:

- Account Management - three (3) years as an Account Director, Senior Account Director or equivalent
- Media Strategy & Direction - five (5) years as a Media Director, Corporate Media Director or equivalent
- Creative Direction - five (5) years as a Creative Director, Executive Creative Director, Group Creative Director or equivalent

## C.2. POINT RATED TECHNICAL CRITERIA

Rated Criteria	Minimum Points Required	Maximum Points
C.2.1. Experience of the Bidder	300	500
C.2.2 Key Personnel	157	225
C.2.3 Management Approach	60	100
C.2.4 Understanding of Department of Finance requirement	87	145
C.2.5 Environmental	N/A	30

Bidders that fail to meet the minimum points in each rated criterion will not be evaluated further and will be considered non-responsive.

**The following scoring grid will be used for the evaluation of all rated criteria:**

Percentage	Rating Level	Description
80-100%	Strong	<ul style="list-style-type: none"> <li>- The information is comprehensive and provides an excellent picture of what was requested.</li> <li>- Meets all and exceeds many or all the requirements of the capability, expertise or capacity being evaluated. No inherent weaknesses. Distinguishes themselves from the norm.</li> </ul>
60-79%	Satisfactory	<ul style="list-style-type: none"> <li>- The information provides a good picture of what was requested. Some aspects are less clear.</li> <li>- Meets most of the requirements of the capability, expertise or capacity being evaluated. Overall, the strengths outnumber the one or two moderate, or several minor weaknesses or deficiencies that are present. The weaknesses pose no important risk to the project.</li> </ul>
40-59%	Weak	<ul style="list-style-type: none"> <li>- The information provides only a partial picture of what was requested and therefore difficult to evaluate.</li> <li>- Meets some of the requirements of the capability, expertise or capacity being evaluated. One or more major weaknesses or deficiencies are present which pose important risk to the project.</li> </ul>
0-39%	Unacceptable	<ul style="list-style-type: none"> <li>- Did not submit enough or the right information to adequately evaluate the requirement.</li> </ul>

### C.2.1 EXPERIENCE OF THE BIDDER - REQUIREMENTS AND RATED CRITERIA - 500 POINTS

What we are looking for:

Demonstration that the Bidder or its senior personnel has developed compelling and insightful creative solutions using a variety of traditional and non-traditional media to solve business or social issues for their clients (e.g., raise awareness of a product or service, increase sales, promote a healthy behaviour, etc.). And, a demonstration that the Bidder has superior production capabilities.

The Bidder should provide two (2) examples of advertising/marketing campaigns which were completed\* within the past two (2) years of the bid closing date and produced by the Bidder or its senior personnel.

\*Completed advertising/marketing campaign is one for which the planning and production have been completed, tactics have been executed, and measured results are known.

The following criteria will be evaluated based on the information submitted by Bidders using the example template under **EXPERIENCE OF THE BIDDER - EXAMPLE TEMPLATE**, below. For

For criteria **C.2.1.1, C.2.1.2 and C.2.1.3**, the technical score will be calculated by taking an average score obtained for each example.

For criteria **C.2.1.4**, the technical score will be evaluated using the information provided in the three examples collectively.

#### **C.2.1.1 Strategic Thinking (Solution/Creative Concept) - 125 Points**

The Bidder:

- clearly and succinctly articulated the client's objectives and the role of the Agency;
- demonstrated an in-depth understanding of the product/service/social issue market(s) and target audience(s);
- extrapolated key insight(s) to rationalize creative and media recommendations;
- recommended insightful creative and described why and how the creative idea resonated with and motivated the target audience(s);
- rationalized how the creative examples worked together, and why, to achieve the stated business objective(s).

#### **C.2.1.2 Strategic Thinking (Media) - 125 Points**

The Bidder:

- developed a comprehensive approach to recommending specific communications vehicles to meet the objective(s);
- recommendations were supported by evidence and focused on results;
- the execution was true to the strategy.

#### **C.2.1.3 Quality of Creative Materials - 125 Points**

The production quality of the various elements (e.g., layout, on-screen talents' performance; voice over, sound, animation, art direction, cinematography, overall technical, photography) was technically sound.

#### **C.2.1.4 Breadth of Experience Targeting Audiences with Various Demographic and/or Ethnic Profiles - 125 Points**

Demonstrated experience in executing campaigns aimed at a variety of different audiences.

### **EXPERIENCE OF THE BIDDER - EXAMPLE TEMPLATE**

The Bidder should: use the headings and sub-headings provided below; use plain language; provide facts and sources; and ensure that creative samples are properly labeled.

#### **SECTION I: BACKGROUND INFORMATION**

Agency Name:

Campaign Name:

Client Name:

Campaign Dates:

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Geographic Area Covered:

Campaign Budget Range:

Under \$500K                       \$500K to \$1M                       \$1M to \$2M  
 \$2M to \$3M                       \$3M to \$4M                       over \$4M

**SECTION II: SITUATION ANALYSIS (Limit 300 words)**

Describe your client's business requirement, challenge, or opportunity and what your agency was hired to do. Include a description of the product/service/social issue at the heart of the campaign, the market(s) and the target audience(s).

**SECTION III: STRATEGIC THINKING (Limit 700 words)**

Describe the strategic thinking behind the creative approach and the media strategy that you developed to respond to your client's objectives. This should include: a summary of the key data, information, and/or insights (including sources) that anchored your strategic recommendations and why; a description of the creative idea; the central message; the target audience(s); your rationale to explain why the idea would be compelling to the target audience(s); and, a summary of the media strategy and why it would meet the objectives.

**SECTION IV: CAMPAIGN EXECUTION (Limit 400 words)**

Describe what communication approaches were used and how all the elements of the campaign worked together. Explain how the creative idea was executed in the various media and illustrate the role of each element and the synergy between them. Summarize the media plan (percentage of budget allocated to each medium, weight levels, and roll-out dates by medium) and the rationale behind it.

**SECTION V: RESULTS (Limit 300 words)**

Summarize the campaign results. Results must be for the entire campaign period and should not only relate to specific peaks where results were the best. Include campaign metrics (key performance indicators) and outcome(s) relative to the benchmarks and the client's business objectives.

**SECTION VI: CREATIVE SAMPLES**

Provide two (2) digital samples of final versions\* of all related campaign creative materials, (on CD, DVD or flash drive) formatted for viewing in Microsoft Windows to include:

- Image Files - .pdf file type;
- Video Files - QuickTime for Windows - .mov file type - .avi file type / H
- Audio Files -mp3, stereo,

\*Final versions refer to those that appeared in media. Draft creative will not be accepted.

**C.2.2 KEY PERSONNEL - REQUIREMENTS AND RATED CRITERIA - 225 POINTS**

What we are looking for:  
Demonstration that the Bidder has personnel in key service categories with the capability, capacity and expertise to provide the required services and deliverables listed in the Statement of Work.

For each of the three service categories below, the Bidder should provide a minimum of one (1) to a maximum of three (3) C.V.'s of proposed individuals who will be assigned to work on

Government of Canada campaigns. Only those individuals who meet the minimum number of years of experience required for each category of service (described in C.1.2) will be evaluated.

The score for each category will be calculated using the average score obtained by each resource.

### Categories of Service

- Account Management;
- Media Strategy and Direction; and
- Creative Direction.

The C.V.'s should be limited to two (2) pages and include the following information:

- the proposed category of service for which the individual is being proposed;
- the number of years of experience in the advertising/marketing communications field;
- the number of years of experience in the proposed category of service;
- any professional accreditations, related professional development, and awards;
- proficiency in English and French; and
- three (3) examples of projects in the last three (3) years (as of bid closing date) that demonstrate the individual's expertise in their field. Each example should provide details on the scope and size of the project and the individual's role and contribution.

Each individual who meets the minimum number of years in the position will be evaluated on the following:

#### C.2.2.1 Account Management – 75 points

- Number of years in the advertising/marketing communications field: 3-5 years (30 points); 6-9 years (40 points); 10+ years (50 points);
- relevant combined formal education, accreditation and professional development;
- efforts made to maintain/upgrade their professional skills and knowledge;
- relevant expertise demonstrated through their role and contribution to the successful outcome of the three (3) sample projects in their C.V.

#### C.2.2.2 Media Strategy & Direction - 75 Points

- Number of years in the advertising/marketing communications field: 5-6 years (30 points); 7-9 years (40 points); 10+ years (50 points);
- relevant combined formal education, accreditation and professional development;
- efforts made to maintain/upgrade their professional skills and knowledge;
- relevant expertise demonstrated through their role and contribution to the successful outcome of the three sample (3) projects in their C.V.;
- experience planning national\* campaigns to reach English and French audiences.

\*National campaign is defined as a campaign delivered in at least four regions of Canada. One of these four regions must be Quebec. The regions are: British Columbia; Prairies (Alberta, Saskatchewan, and Manitoba); Ontario; Quebec; Atlantic (New Brunswick, Nova Scotia, Prince Edward Island, Newfoundland and Labrador); and the Territories (Yukon, North West Territories, Nunavut).

#### C.2.2.3 Creative Direction - 75 Points

- Number of years in the advertising/marketing communications field: 5-6 years (30 points); 7-9 years (40 points); 10+ years (50 points);
- relevant combined formal education, accreditation and professional development;
- efforts made to maintain/upgrade their professional skills and knowledge;

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- relevant expertise demonstrated through their role and contribution to the successful outcome of the three (3) sample projects in their C.V.

### **C.2.3 MANAGEMENT APPROACH - REQUIREMENTS AND RATED CRITERIA - 100 POINTS**

What we are looking for:  
Demonstration that the Bidder can manage competing priorities, assign the required resources to a project, and control budgets, timelines and quality.

#### **C.2.3.1 Robust Management Systems - 50 Points**

The Bidder should describe how they assign resources to projects and control budgets and timelines; the systems and processes that are in place to manage projects that may require the use of the same limited resources and their approach to acquiring surge capacity; and, their approach to quality assurance.

#### **C.2.3.2 Quality Assurance Process for Language and Creative Adaptation - 50 Points**

The Bidder should describe the processes that are in place to ensure the quality of creative materials that are translated/adapted from one of Canada's official languages into the other, and into any number of other languages for various ethno-cultural audiences.

### **C.2.4 UNDERSTANDING OF DEPARTMENT OF FINANCE REQUIREMENT - REQUIREMENTS AND RATED CRITERIA - 145 POINTS**

What we are looking for:  
Demonstration that the Bidder understands the Department of Finance's advertising challenges, opportunities and objectives.

#### **C.2.4.1 Potential Challenges - 45 Points**

The Bidders should demonstrate a clear understanding of the potential challenges of this advertising initiative and describe solutions to overcome them.

#### **C.2.4.2 Communicate with the target audience - 50 Points**

The Bidders should demonstrate an understanding of the target audience and describe the most effective way to communicate with them (i.e. media mix, approach, partnership etc.) Outline the opportunities specific to this undertaking including how this affects the advertising targeted at Canadians during the current economic situation.

#### **C.2.4.3 Advertising initiatives objectives - 50 Points**

Demonstrate an understanding of the full scope of the project (i.e. political environment, sensitivities, etc.) and the key considerations that will most likely be required to effectively meet the campaign objectives.

### **C.2.5 ENVIRONMENTAL - REQUIREMENTS AND RATED CRITERIA - 30 POINTS**

What we are looking for:  
Demonstration that the Bidder has environmentally ethical and sustainable business practices.

The Bidder should provide their existing or proposed company-wide environmental statement and mission (including environmental measures undertaken in office operations); and their existing or proposed action plan for materials/equipment sourcing (e.g., intended use of recycled or reused products, waste management strategy, etc.).

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### C.3 FINANCIAL EVALUATION

The figures below are for demonstration purposes only and do not represent current or expected hourly rates for advertising services.

The financial scores will be calculated as follows:

**Step 1:** For each Bidder, an average hourly rate per category of service will be calculated using the rates submitted for each of the three periods of the contract (initial 1-year period, extension period 1, extension period 2).

#### Example of Step 1:

##### Bidder A

Category of Service	HOURLY RATE FOR INITIAL 1-YEAR PERIOD	HOURLY RATE FOR EXTENSION PERIOD 1	HOURLY RATE FOR EXTENSION PERIOD 2	AVERAGE HOURLY RATE
Account Management	\$150.00	\$155.00	\$160.00	\$155.00
Media Strategy and Direction	\$160.00	\$165.00	\$170.00	\$165.00
Creative Direction	\$180.00	\$185.00	\$190.00	\$185.00
Blended Rate for all other services	\$190.00	\$195.00	\$200.00	\$195.00

##### Bidder B

Category of Service	HOURLY RATE FOR INITIAL 1-YEAR PERIOD	HOURLY RATE FOR EXTENSION PERIOD 1	HOURLY RATE FOR EXTENSION PERIOD 2	AVERAGE HOURLY RATE
Account Management	\$175.00	\$180.00	\$185.00	\$180.00
Media Strategy and Direction	\$180.00	\$185.00	\$190.00	\$185.00
Creative Direction	\$200.00	\$205.00	\$210.00	\$205.00
Blended Rate for all other services	\$170.00	\$175.00	\$180.00	\$175.00

##### Bidder C

Category of Service	HOURLY RATE FOR INITIAL 1-YEAR PERIOD	HOURLY RATE FOR EXTENSION PERIOD 1	HOURLY RATE FOR EXTENSION PERIOD 2	AVERAGE HOURLY RATE
Account Management	\$320.00	\$325.00	\$330.00	\$325.00
Media Strategy and Direction	\$330.00	\$335.00	\$340.00	\$335.00
Creative Direction	\$345.00	\$350.00	\$355.00	\$350.00
Blended Rate for all other services	\$330.00	\$335.00	\$340.00	\$335.00

##### Bidder D

Category of Service	HOURLY RATE FOR INITIAL 1-YEAR PERIOD	HOURLY RATE FOR EXTENSION PERIOD 1	HOURLY RATE FOR EXTENSION PERIOD 2	AVERAGE HOURLY RATE
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Account Management	\$375.00	\$380.00	\$380.00	\$380.00
Media Strategy and Direction	\$420.00	\$425.00	\$430.00	\$425.00
Creative Direction	\$385.00	\$390.00	\$395.00	\$390.00
Blended Rate for all other services	\$355.00	\$360.00	\$365.00	\$360.00

**Bidder E**

Category of Service	HOURLY RATE FOR INITIAL 1-YEAR PERIOD	HOURLY RATE FOR EXTENSION PERIOD 1	HOURLY RATE FOR EXTENSION PERIOD 2	AVERAGE HOURLY RATE
Account Management	\$45.00	\$50.00	\$55.00	\$50.00
Media Strategy and Direction	\$65.00	\$70.00	\$75.00	\$70.00
Creative Direction	\$55.00	\$60.00	\$65.00	\$60.00
Blended Rate for all other services	\$35.00	\$40.00	\$45.00	\$40.00

**Step 2:** The highest and lowest average hourly rate per category of service will be removed prior to calculating the overall average rate per category.

**Example of Step 2:**

Bidder	ACCOUNT MANAGEMENT	MEDIA STRATEGY & DIRECTION	CREATIVE DIRECTION	BLENDED RATE (OTHER SERVICES)
Bidder A	\$155.00	\$165.00	\$185.00	\$195.00
Bidder B	\$180.00	\$185.00	\$205.00	\$175.00
Bidder C	\$325.00	\$335.00	\$350.00	\$335.00
Bidder D	\$380.00	\$425.00	\$390.00	\$360.00
Bidder E	\$50.00	\$70.00	\$60.00	\$40.00
OVERALL AVERAGE	\$220.00	\$228.33	\$246.66	\$235.00

**Step 3:** If any Bidder's average hourly rate per category is more than 50% below or 100% above the overall average of a category of service, its bid will be considered non-responsive.

**Example of Step 3:**

Bidder	ACCOUNT MANAGEMENT	MEDIA STRATEGY & DIRECTION	CREATIVE DIRECTION	BLENDED RATE (OTHER SERVICES)
Bidder A	\$155.00	\$165.00	\$185.00	\$195.00
Bidder B	\$180.00	\$185.00	\$205.00	\$175.00
Bidder C	\$325.00	\$335.00	\$350.00	\$335.00
Bidder D	\$380.00	\$425.00	\$390.00	\$360.00
Bidder E	\$50.00	\$70.00	\$60.00	\$40.00
OVERALL AVERAGE	\$220.00	\$228.33	\$246.66	\$235.00
Maximum Responsive Hourly Rate	\$440.00	\$456.66	\$493.32	\$470.00
Minimum Responsive	\$110.00	\$114.17	\$123.33	\$117.50

Hourly Rate				
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**The Bid from Bidder E would be non-responsive as they did not meet the minimum responsive hourly rate.**

**Step 4:** The weighted Financial Score will be determined per category of service

**Example of Step 4:**

Lowest Responsive Hourly Rate X 7.5 = Weighted Financial Score per Category  
Bidder's Hourly Rate

Bidder	ACCOUNT MANAGEMENT	WEIGHTED FINANCIAL SCORE
Bidder A	\$155.00	7.50
Bidder B	\$180.00	6.46
Bidder C	\$325.00	3.58
Bidder D	\$380.00	3.06

Bidder	MEDIA STRATEGY & DIRECTION	WEIGHTED FINANCIAL SCORE
Bidder A	\$165.00	7.50
Bidder B	\$185.00	6.69
Bidder C	\$335.00	3.69
Bidder D	\$425.00	2.91

Bidder	CREATIVE DIRECTOR	WEIGHTED FINANCIAL SCORE
Bidder A	\$185.00	7.50
Bidder B	\$205.00	6.77
Bidder C	\$350.00	3.96
Bidder D	\$390.00	3.56

Bidder	BLENDED RATE (OTHER SERVICES)	WEIGHTED FINANCIAL SCORE
Bidder A	\$195.00	6.73
Bidder B	\$175.00	7.50
Bidder C	\$335.00	3.92
Bidder D	\$360.00	3.65

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**Step 5:** The Total Financial Score will be calculated by adding all of the weighted Financial Scores per category.

**Example of Step 5:**

<b>Bidder</b>	<b>ACCOUNT MANAGEMENT</b>	<b>MEDIA STRATEGY &amp; DIRECTION</b>	<b>CREATIVE DIRECTION</b>	<b>BLENDED RATE (OTHER SERVICES)</b>	<b>TOTAL SCORE</b>
<b>Bidder A</b>	<b>7.50</b>	<b>7.50</b>	<b>7.50</b>	<b>6.73</b>	<b>29.23</b>
<b>Bidder B</b>	<b>6.46</b>	<b>6.69</b>	<b>6.77</b>	<b>7.50</b>	<b>27.42</b>
<b>Bidder C</b>	<b>3.58</b>	<b>3.69</b>	<b>3.96</b>	<b>3.92</b>	<b>15.15</b>
<b>Bidder D</b>	<b>3.06</b>	<b>2.91</b>	<b>3.56</b>	<b>3.65</b>	<b>13.18</b>

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## ANNEX D - TASK AUTHORIZATION FORM PWGSC-TPSGC 572



Travaux publics et  
Services gouvernementaux  
Canada

Public Works and  
Government Services  
Canada

**Annex  
Annexe**

### Task Authorization Autorisation de tâche

Contract Number - Numéro du contrat

Contractor's Name and Address - Nom et l'adresse de l'entrepreneur	Task Authorization (TA) No. - N° de l'autorisation de tâche (AT)
	Title of the task, if applicable - Titre de la tâche, s'il y a lieu
	Total Estimated Cost of Task (GST/HST extra) Coût total estimatif de la tâche (TPS/TVH en sus) \$

Security Requirements: This task includes security requirements

Exigences relatives à la sécurité : Cette tâche comprend des exigences relatives à la sécurité

No - Non  Yes - Oui

If YES, refer to the Security Requirements Checklist (SCRL) included in the Contract

Si OUI, voir la Liste de vérification des exigences relative à la sécurité (LVERS) dans le contrat



### For Revision only - Aux fins de révision seulement

TA Revision Number, if applicable Numéro de révision de l'AT, s'il y a lieu	Total Estimated Cost of Task (GST/HST Extra) before the revision Coût total estimatif de la tâche (TPS/TVH en sus) avant la révision \$	Increase or Decrease (GST/HST Extra), as applicable Augmentation ou réduction (TPS/TVH en sus), s'il y a lieu \$
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**Start of the Work for a TA : Work cannot commence until a  
TA has been authorized in accordance with the conditions  
of the contract.**

**Début des travaux pour l'AT : Les travaux ne peuvent pas  
commencer avant que l'AT soit autorisée conformément  
au contrat.**

### 1. Required Work: - Travaux requis :

A. Task Description of the Work required - Description de tâche des travaux requis	See Attached - Ci-joint <input type="checkbox"/>
B. Basis of Payment - Base de paiement	See Attached - Ci-joint <input type="checkbox"/>
C. Cost of Task - Coût de la tâche	See Attached - Ci-joint <input type="checkbox"/>
D. Method of Payment - Méthode de paiement	See Attached - Ci-joint <input type="checkbox"/>

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**Annex  
Annexe**

Contract Number - Numéro du contrat

## 2. Authorization(s) - Autorisation(s)

By signing this TA, the authorized client and (or) the PWGSC Contracting Authority certify(ies) that the content of this TA is in accordance with the conditions of the contract.

En apposant sa signature sur l'AT, le client autorisé et (ou) l'autorité contractante de TPSGC atteste(nt) que le contenu de cette AT respecte les conditions du contrat.

The client's authorization limit is identified in the contract. When the value of a TA and its revisions is in excess of this limit, the TA must be forwarded to the PWGSC Contracting Authority for authorization.

La limite d'autorisation du client est précisée dans le contrat. Lorsque la valeur de l'AT et ses révisions dépasse cette limite, l'AT doit être transmise à l'autorité contractante de TPSGC pour autorisation.

\_\_\_\_\_  
Name and title of authorized client - Nom et titre du client autorisé à signer

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
PWGSC Contracting Authority - Autorité contractante de TPSGC

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## 3. Contractor's Signature - Signature de l'entrepreneur

\_\_\_\_\_  
Name and title of individual authorized - to sign for the Contractor  
Nom et titre de la personne autorisée à signer au nom de l'entrepreneur

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date